

The Power of Thought Leadership Media Kit

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Surveys, Research Studies, White Papers, and Executive Briefs are powerful business development tools. Offer individuals the chance to participate in a survey and study about a compelling and newsworthy topic – something that impacts them or their business - and they will likely engage because 1) People like giving their opinion – it makes them feel that their ideas matter, and 2) They want to know what their peers and market leaders are thinking and doing.

This Thought Leadership (a.k.a. Intellectual Capital) Media Kit describes the strategy and tactics and includes components that illustrate the "what" and "how" for [“Will You Be Ready? How the Communications Industry is Surviving While Planning for a Robust Future.”](#) This was one of several industry Thought Leadership Surveys and Studies led by Patricia Block, Business Development, Marketing & PR Consultant, and conducted for the Communications Systems & Services Specialty Practice Group, one of many specialty practice groups in Spencer Stuart’s Technology, Communications & Media Practice.

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The Power of Thought Leadership

Surveys, Research Studies, White Papers, Executive Briefs

Thought Leadership (a.k.a. Intellectual Capital) Has Amazing Impact

- Surveys, research studies and white papers are **powerful business development tools**.
- The end product – survey results or white paper – is important. But **the real payoff comes** when engaging clients and prospects in the data collection process **through live interviews and mailed surveys**.
- **Create a list of companies and executives that you want to work with** and reach out to them, asking for participation in your market survey and study.
- Make the topic newsworthy and compelling – i.e., about something that impacts them or their business – and **they will respond. Why?**
 - **People like giving their opinion** because it makes them feel that their ideas matter, and
 - **They want to learn** what their peers and market leaders are thinking and doing.
- **Thought Leadership Content:**
 - Positions company as **innovative thought leader**.
 - **Illustrates access** to industry and market leaders.
 - Serves as basis for **high-level discussions** with target companies and individuals.
 - Provides **instant credibility** and true competitive differentiation.
 - **Transcends “transaction only” nature** of some client relationships.
 - **Provides comfort level** that client/prospect is dealing with forward-thinking industry expert.
 - **Helps position company** for media mentions, press quotes and speaking engagements.

EXAMPLE: “Will You Be Ready? How the Communications Industry is Surviving While Planning for a Robust Future”



Served as project director for Spencer Stuart’s Communications Systems and Services Specialty Practice Group market survey and study. Secured alliance with Telecommunications Industry Association (TIA). Face-to-face and telephone interviews and electronic survey:

- Enhanced firm visibility
- Established relationships with prospects
- Secured senior forum panel and speaking opportunities
- Led to \$ millions in new work

Thought Leadership Development Process

- Brainstorm an appropriate subject, and **make the title (headline) relevant, ear-catching and news-worthy**.
- **Develop a plan** for data collection and writing survey results.
- **Build high-level outline** of assumptions, findings and conclusions.
- **Important:** Find appropriate Strategic Partner, Industry Association or Publication to partner with. This **adds greatly to study cachet and helps broaden market reach**.
- Reach out to clients and prospects and invite their participation in the survey – **these data collection interviews open doors, establish and build relationships, and plant seeds that lead to add-on or new work.**
- **Draft survey results** – be sure to edit for voice, clarity, consistency, conciseness and catchiness.
- Add direct comments from interviews. **Powerful quotes are important** – they are what people read first in newspapers, reports, white papers, etc.
- **Obtain feedback** on draft from colleagues, clients, friends, PR firm, editors.
- **Edit then publish** final results.

Leveraging Thought Leadership

- **Email** to prospects before meeting and **snail-mail** to dormant clients to re-establish contact.
- **Distribute** at networking events, industry forums, conferences and speaking engagements.
- **Media Relationships and Coverage**
 - Survey results are a great way to **help get “foot in the door”** and establish relationship with premiere business publications and local, regional and national media.
 - **Content may be excerpted and repurposed** in newspaper articles, features and newsletters.
 - **Survey results serve as basis** for future magazine article or book.

Spencer Stuart
Technology, Communications & Media (TCM) Practice
Program Brief

Communications Specialty Practice Study & Blue Paper
Will You Be Ready?

Initiative

The meltdown of the U.S. Telecommunications Industry will have serious implications on the U.S. and Global Economy in the coming years. The industry has been plagued not only by the economic downturn, but by aggressive over-spending, financial fraud, poor corporate governance, negative effects of deregulation, and lack of competition to ignite further innovation and capital outlays.

Leaders and senior managers in the industry face many challenges. At present, they are focused on remaining solvent to weather the storm. To that end, we have designed an Intellectual Capital project that will provide access to industry leaders to discuss the current situation and learn about how they plan to manage their leadership and corporate governance strategies now and going forward.

Our research and final paper will address four major areas—strategy and operational plans, corporate governance, CEO and senior management succession, and attraction/retention issues. The study's title and overarching theme serve to tee up an important question: i.e., ***“Will You Be Ready?”*** In other words, how are communication industry leaders and senior management facing the current litany of economic and market challenges? What are they doing to manage their human capital strategies now—and what are their future plans—to prepare effectively for the ultimate upturn? Our paper will answer these questions and provide first-hand insights into these and related industry challenges.

End deliverables of this project include publication of study top line findings, a white paper and other related articles. The project will also help to introduce and establish relationships with relevant decision makers and influencers in the sector. These constituencies include Board Members and Senior Managers in the Industry. We have also formally partnered with the Telecommunications Industry Association (TIA) on this project, and are planning a number of joint activities to broaden market visibility for the study, practice and Spencer Stuart.

Internal Sponsors

John Keller, Tom Scanlan, Terry Price, Don Render

Study Target Audience

- CEO/GM
- Business Unit/HR Leaders

Business Goals

- Establish and strengthen relationships with high profile C-level and senior executives with targeted companies (Communications Systems and Communication Service companies)
- Increase our credibility rating with these executives and prospective clients
- Reinforce Spencer Stuart's strengths and capabilities on human capital asset management issues
- Increase Spencer Stuart's market visibility and raise awareness in minds of targeted executives
- Differentiate us from our competitors
- Plant seeds for future work
- Generate PNB opportunities

Schedule

- | | |
|--|--------|
| • Blue paper outline sent to Corporate | Apr 10 |
| • Copy to Approval | Apr 21 |
| • Final approval in | Apr 25 |

- Copy to Design Apr 28
- Quantity/Distribution List sent to designer May 8
- Design to Approval May 12
- Approval in May 14
- Final Revisions May 16
- Print May 19
- Materials Ready for Distribution Jun 1

Key Communications and Messaging

- SSA Communications industry consultants are recognized industry thought leaders possessing the kind of talent, insight and expertise that allows us to place highly qualified, successful C-level and Board members in Communications industry leadership roles
- Highlights our experience across broad spectrum of communication segments:
 - Communications Systems
 - Communications Services
 - Communications Software
 - Wireless
 - Wireline

Marketing Communications/Creative Program Components and Mechanical Details

- Phase One includes total 3,000 papers
- Mechanical details TBD

Budget

Estimate \$7,200 to print 3,000 copies

<u>STATUS</u>	<u>Email</u>	<u>Interview</u>	<u>Company Name - Current Job</u>	<u>Person Name</u>	<u>Position - Current Job</u>	<u>Primary Function - Category - Current Job</u>	<u>Job Location - Current Job</u>	<u>Last Asgn. Contacted by Employee</u>	<u>Last BD Contacted by Employee</u>	<u>Last BD Contact Status/Activity</u>	<u>Email Address 1</u>	<u>Personal Email</u>
CEO/GM survey	Brad Farnsworth		CapRock Communications Corporation	Shaper, Peter	President and CEO	General Management	Houston Texas	Petty, Scott	Farnsworth, Brad	Business Development/Met	Pshaper@genesis-park.com	
CEO/GM survey	Bruce Lachenauer		Brightcom	Yuval Ben-Zeev	President and CEO						yuvalbz@brightcom.com	
CEO/GM survey	Bruce Lachenauer		CCPU	Kenneth J. Kalb	CEO					858.882.8800		
CEO/GM survey	Bruce Lachenauer		Cubic	Walter Zable	Chairman, President & CEO					(858)277-6780		
CEO/GM survey	Bruce Lachenauer		Ensemble Communications	Twyver, David	CEO					(858)535-4737		
CEO/GM survey	Bruce Lachenauer		Jabra	Raleigh Wilson	General Manager and Senior Vice President					(858) 622-9955		
CEO/GM survey	Bruce Lachenauer		Littlefeet, Inc.	Combs, John W.	Chief Executive Officer/Chariman	General Management	Poway California	Floyd, Jennifer			john.combs@nextel.com	
CEO/GM survey	Bruce Lachenauer		Magis Networks	Clarence Bruckner	chairman, president and CEO					(858) 523-2300		
CEO/GM survey	Bruce Lachenauer		NextGig	Casey Powell	President & CEO					858-332-4900		
CEO/GM survey	Bruce Lachenauer		Opticomm	David Caidar	CEO					858 450-0143		
CEO/GM survey	Bruce Lachenauer		Peregrine Semiconductor	James S. Cable	CEO & President					(858) 455-0660		
CEO/GM survey	Bruce Lachenauer		SorrentoNet	Phillip Arneson	Chairman, Chief Executive Officer, and President					858-558-3960		
CEO/GM survey	Bruce Lachenauer		StoragePoint	Scott Zimmerman	CEO					858.650.3100	sales@storagepoint.net	
CEO/GM survey	Bruce Lachenauer		Tachyon, Inc.	Gercenstein, Mark	President and CEO							
CEO/GM survey	Bruce Lachenauer		Titan	Gene W. Ray	Chairman of the Board and Chief Executive Officer					(858) 552-9500		
CEO/GM survey	Bruce Lachenauer		Wavecom	Hany Neoman	CEO					858 362-0101		
CEO/GM survey	Bruce Lachenauer		Widcomm	Hiep Pham	Co-Founder, President, CEO, Board of Directors						hpham@widcomm.com	

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CEO/GM survey	Bruce Lachenauer		Zucotto Wireless	David Grooms	CEO					(613)789-0090		
CEO/GM survey	Debbie Soon		2Wire, Inc.	Hinman, Brian	President/Chief Executive Officer	General Management	Milpitas California	Visbal, Jonathan			bhinman@2wire.com	
CEO/GM survey	Debbie Soon		Alopa Networks, Inc.	Engdahl, Tom	President/Chief Executive Officer	General Management	Sunnyvale California	Gibson, Michelle			mfoley@alopa.com	foley@excitehome.net
CEO/GM survey	Debbie Soon		Cereva Networks, Inc.	Lutz, Alan G. (AI)	President/CEO	General Management	Marlborough, Massachusetts	Johnston, Phil	Sintes, Gustavo			aidilu@aol.com
CEO/GM survey	Debbie Soon		Cisco Systems, Inc.	Hill, Kathy	VP/GM-Desktop Switching BU	General Management	San Jose California	Soon, Deborah			kathyh@cisco.com	
CEO/GM survey	Debbie Soon		ClickAction, Inc.	Slayton, Gregory W.	President/Chief Executive Officer	General Management	Palo Alto California	O'Sullivan, Jim	Gordon, Scott	Business Development/Meeting Scheduled	gws@clickaction.com	
CEO/GM survey	Debbie Soon		EchoPass Corporation	Panyko, Stephen F. (Steve)	Chief Executive Officer	General Management	Westboro Massachusetts	Lynch, Michael	Kelley, Randall	Business Development/	spanyko@onixmicrosys.com	sfpanyko@aol.com
CEO/GM survey	Debbie Soon		Occam Networks, Inc.	Howard-Anderson, Robert L. (Bob)	Chief Executive Officer	General Management	Santa Barbara California	Lynch, Michael				bobha56@yahoo.com
CEO/GM survey	Debbie Soon		Overture Networks	Reedy, Jeff	President/Chief Executive Officer	General Management	Research Park Triangle North Carolina	Soon, Deborah			jeff.reedy@overturenetworks.com	
CEO/GM survey	Debbie Soon		Longboard	Tauss, Gary H.	CEO	General Management	Santa Clara California	Lynch, Michael			gary@tollbridgetechnologies.com	gtauss@attbi.com
CEO/GM survey	Don Render		Advanced Fibre Communications	Schofield, John A.	President/Chief Executive Officer	General Management	Petaluma California	Fisch, Stephanie			john.schofield@afc.com	
CEO/GM survey	Don Render		Airspan Networks, Inc.	Stonestrom, Eric	President/Chief Executive Officer	General Management	Sunrise Florida	Render, Don			estonest@airspan.com	
CEO/GM survey	Don Render		Cingular Wireless	Whiddon, Jr., John Laren. (Laren)	VP/GM-IL & WI		Barrington Illinois				Laren_Whiddon@bscc.bls.com	
CEO/GM survey	Don Render		Cirrex	Bender, Albert D. (AI)	CEO	General Management	Alpharetta Georgia	Smith, Shellie				a-jbender@worldnet.att.net
CEO/GM survey	Don Render		Convergence Communications, Inc.	Jacobs, Douglas K.	CEO	General Management	Sunrise Florida	Piche, Jerome			djacobs@convergence-comm.net	djacobs560@aol.com
CEO/GM survey	Don Render		Global Streams, Inc.	Briscoe, Ted	CEO	General Management	St. Louis Missouri	Hooks, Tonya			tedb@globalstreams.com	
CEO/GM survey	Don Render		Kestrel Solutions	Cannon, Woodrow B. (Woody)	Chief Executive Officer	General Management	Mountain View California	Leonhart, Lee				wbcannon@hotmail.com
CEO/GM survey	Don Render		NewSouth Communications	Akerhielm, James M.	President/CEO	General Management	Greenville South Carolina	Tompkins, Suzy			jakerhielm@newsouth.com	
CEO/GM survey	Don Render		Xebeo Communications	Skarzynski, Michael P. (Mike)	CEO	General Management	South Plainfield New Jersey	Honda, Chiyo			mskarzynski@xebeo.com	mskarzynski@hotmail.com
CEO/GM survey	John Keller		Apax Partners, Inc.	Schell, Theodore H. (Ted)	General Partner	Financial Services	New York, New York	Pryor, Carrie	de Cholnoky, Andrea		theodore.schell@apax.com	
CEO/GM survey	John Keller		Clear Communications Corporation	Richards, Thomas E. (Tom)	Chairman, President & CEO	Boards	Lincolnshire, Illinois	Keller, John	Sintes, Gustavo			
CEO/GM survey	John Keller		Covad Communications, Inc.	Hoffman, Charles E. (Charlie)	President/CEO	General Management	Santa Clara, California	Keller, John	Sintes, Gustavo		choffman@rci.rogers.com	
CEO/GM survey	John Keller		Cypress Communications	Blount, W. Frank. (Frank)	CEO/Chairman	General Management	Atlanta, Georgia	Cohen, Henk	Sintes, Gustavo		fblount@attglobal.net	fblount@attglobal.net

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CEO/GM survey	John Keller		Diveo Broadband Networks, Inc.	Schmieg, David R. (Dave)	Chairman/Chief Executive Officer	Boards	Washington, District of Columbia	Keller, John	Sintes, Gustavo			dschmieg@adelphia.net
CEO/GM survey	John Keller		Efficient Market Services, Inc.	Sentell, Susan B. (Sue)	President/Chief Executive Officer	General Management	Deerfield, Illinois	Walsh, Patrick	Sintes, Gustavo		sue_sentell@emsiinfo.com	Sueoncircle@aol.com
CEO/GM survey	John Keller		Intransa, Inc.	Kessler, Alan J.	CEO/President	General Management	Sunnyvale, California	Rizk, Nayla	Sintes, Gustavo		alan.kessler@intransa.com	
CEO/GM survey	John Keller		Lucent Technologies, Inc.	Russo, Patricia F. (Pat)	President/Chief Executive Officer	General Management	Murray Hill, New Jersey	Lindsay, Marla	Leon, Jeffrey		pfrusso@lucent.com	
CEO/GM survey	John Keller		Motient Corporation	Parsons, Gary M.	Chairman/CEO	Boards	Reston, Virginia	Steinegger, Karen	Sintes, Gustavo			
CEO/GM survey	John Keller		Mpower Holding Corporation	Huff, Rolla P.	Chief Executive Officer	General Management	Pittsford, New York	Daum, Julie	Sintes, Gustavo			
CEO/GM survey	John Keller		Onix Microsystems, Inc.	Crawford, Curtis J.	President/Chief Executive Officer	General Management	Emeryville, California	Castillo, Ada	Sintes, Gustavo			dr.crawford@prodigy.net
CEO/GM survey	John Keller		OpNext, Inc.	Bosco, Harry L.	Chief Executive Officer/President	Professional Svcs (Cnslt/Law)	Eatontown, New Jersey	Lindsay, Marla			hbosco@opnext.com	hbosco@att.net
CEO/GM survey	John Keller		Orius Corporation	Blake, Ronald L.	COB/President/CEO	General Management	West Palm Beach, Florida	Locantro, Susan	Sintes, Gustavo		rblake@oriuscorp.com	rblake2000@yahoo.com
CEO/GM survey	John Keller		RSL COM USA	Marino, Michael A.	Chief Executive Officer	General Management	New York, New York	Scanlan, Thomas	Sintes, Gustavo			
CEO/GM survey	John Keller		Sirius Satellite Radio	Clayton, Joseph P. (Joe)	Chief Executive Officer	General Management	New York, New York	Noonan, Jerry	Sintes, Gustavo		jclayton@siriusradio.com	
CEO/GM survey	John Keller		Talk America Holdings, Inc.	Battista, Gabriel A. (Gabe)	Chairman/Chief Executive Officer	General Management	Reston, Virginia	Aavik, Karl	Sintes, Gustavo		gbattista@talk.com	saltzsl@aol.com
CEO/GM survey	John Keller		Tellium Corporation	Carr, Harry J.	Chairman/CEO	Boards	Oceanport, New Jersey	Lindsay, Marla			harry@tellium.com	
CEO/GM survey	John Keller		Vanguard Managed Solutions LLC	Lane, Richard (Rick)	President/CEO	General Management	Mansfield, Massachusetts	Langdon, Kristine	Sintes, Gustavo		rick.lane@motorola.com	
CEO/GM survey	John Keller		VastVideo, Inc.	Braun, Neil S.	Chairman	Boards	Astoria, New York	Citrin, James	Sintes, Gustavo		nbraun@vastvideo.com	neilbraun@aol.com
CEO/GM survey	John Keller		Verizon Communications, Inc.	Babbio, Jr., Lawrence T. (Larry)	Vice Chairman/President	General Management	New York, New York	Gregor, Donna	Sintes, Gustavo			
CEO/GM survey	John Keller		Verizon Wireless, Inc.	Strigl, Dennis F. (Denny)	President/Chief Executive Officer	General Management	Bedminster, New Jersey	Daum, Julie	Sintes, Gustavo			
CEO/GM survey	John Keller		Vodafone Group PLC	Colao, Vittorio A.	Chief Executive-Southern Europe Region	General Management	Newbury, Berkshire, Great Britain	Small, Elaine	Sintes, Gustavo		vittorio.colao@telecomitalia.it	
CEO/GM survey	Lee Esler		EarthLink, Inc.	Charles G. (Garry) Betty	Pres/CEO							
CEO/GM survey	Lee Esler		Cingular Wireless	Stan Sigman	Pres/CEO							
CEO/GM survey	Lee Esler		BellSouth Corp.	Richard (Dick) Anderson	Pres							
CEO/GM survey	Lee Esler		Equant, Inc.	Didier Delepine, Pres/CEO	Equant Network Services							
CEO/GM survey	WHOSE CLIENT?		United States Cellular, Inc.	Rooney, John E. (Jack)	Chief Executive Officer	General Management	Chicago Illinois	Hooks, Tonya				
CEO/GM survey	Nayla Rizk		Airvana, Inc.	Battat, Randy	President/Chief Executive Officer		Chelmsford Massachusetts				randy.battat@airvananet.com	rbattat@yahoo.com

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CEO/GM survey	Nayla Rizk		Foundry Networks, Inc.	Johnson, Robert (Bobby)	President/Chief Executive Officer	General Management	San Jose California	Lynch, Michael			bj@foundrynet.com	
CEO/GM survey	Nayla Rizk		Hatteras Networks	McPherson, Thomas R.	President/Chief Executive Officer					(919)991-5440, or (408)495-6155		
CEO/GM survey	Nayla Rizk		360networks, Inc.	Maffei, Gregory B. (Greg)	Chief Executive Officer/President	General Management	Vancouver British Columbia Canada	Connelly, Kevin	Hauswirth, Jeff	Business Development/	greg.maffei@360.net	
CEO/GM survey	Nayla Rizk		3COM Corporation	Claflin, Bruce L.	President/Chief Executive Officer	General Management	Santa Clara California	Honda, Chiyo			bruce_claflin@3com.com	
CEO/GM survey	Terry Price		Airband Communications Inc	Lombard, Andrew P. (Andy)	President/CEO		Dallas Texas	Berhau, Louise	Price, Terry	Business Development/Left Message	alombard@airband.com	
CEO/GM survey	Terry Price		AirWalk Communications, Inc.	Han, Jake	CEO		Richardson Texas		Price, Terry	Business Development/Sent Information	jhan@airwalkcom.com	
CEO/GM survey	Terry Price		Alliance Systems, Inc.	Shapiro, Jonathan D. (Jon)	Chief Executive Officer		Plano Texas	Walker, Ann	Price, Terry	Business Development/Completed Follow-up	jshapiro@alliancesystems.com	
CEO/GM survey	Terry Price		Andrew Corporation	Campbell, Guy M.	President/CEO		Orland Park Illinois	Gibson, Michelle				gmc1@aol.com
CEO/GM survey	Terry Price		Aravox Technologies, Inc.	Rich, William J. (Bill)	President/Chief Executive Officer		Arden Hills Minnesota	Piche, Jerome			brich@aravox.com	
CEO/GM survey	Terry Price		Arriso Networks, Inc.	Bass, Joe R.	President & CEO		Richardson Texas	Jones, Sarah			jbass@cisco.com	
CEO/GM survey	Terry Price		Celion Networks, Inc.	Jaggi, Pawan	Chief Executive Officer/Founder		Richardson Texas		Price, Terry	Business Development/Completed Follow-up	pawan.jaggi@celion.com	
CEO/GM survey	Terry Price		CellStar Corporation	Parker, Terry S.	Chief Executive Officer		Carrollton Texas	Jones, Sarah	Price, Terry	Business Development/Sent Information		
CEO/GM survey	Terry Price		Channel Master LLC	Currer, William R. (Bill)	President/Chief Executive Officer		Smithfield North Carolina	Hirshfeld, Jennifer	Price, Terry	Business Development/Completed Follow-up	bcurrer@cmnc.com	billc2420@aol.com
CEO/GM survey	Terry Price		Chiaro Networks	Lewis, Kenneth (Ken)	President/Chief Executive Officer		Richardson Texas	Fisch, Stephanie	Price, Terry	Business Development/Completed Follow-up	klewis@chiaro.com	kenneth@aol.com
CEO/GM survey	Terry Price		Chorum Technologies	Coker, Kent	President/Chief Executive Officer		Richardson Texas	Wallace, Brinley	Price, Terry	Business Development/Sent Information	kcoker@chorumtech.com	
CEO/GM survey	Terry Price		Compelling Networks, Inc.	Apfel, Patrick R.	Founder/CEO		Colorado Springs Colorado	O'Sullivan, Jim	Price, Terry			prapfel@aol.com
CEO/GM survey	Terry Price		Corban Communications	Thomas, P.E., Henry A. (Hal)	Chief Executive Officer		Plano Texas		Price, Terry	Business Development/Sent Information	hthomas@corbancom.com	
CEO/GM survey	Terry Price		Cyneta Networks	Smith, Douglas C. (Doug)	Chief Executive Officer		Plano Texas	Petty, Scott	Price, Terry	Business Development/Completed Follow-up	doug@taleriaventures.com	

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CEO/GM survey	Terry Price		Ellipsus Systems, Inc.	Mortenson, G. Russell (Russ)	Chief Executive Officer		Dallas Texas	Oliver, Nancy	Price, Terry	Business Development/Completed Follow-up		
CEO/GM survey	Terry Price		EngineX Networks, Inc.	Booth, Dale A.	Chairman/CEO		Richardson Texas	Jones, Sarah	Price, Terry	PNB - Board Search	dale.booth@exn.com	dlbooth@swbell.net
CEO/GM survey	Terry Price		Entrust, Inc.	Conner, F. William (Bill)	President/CEO		Addison Texas	Mikrut, Michelle	Price, Terry	Business Development/Sent Information	FAX: 972-713-5805	
CEO/GM survey	Terry Price		Fuegotech, Inc.	Theilken, Mark S.	Chief Executive Officer		Addison Texas	Walker, Ann	Price, Terry	Business Development/Sent Information	mtheilken@aristotle.net	
CEO/GM survey	Terry Price		Globeranger Corp.	Todd, John	President/CEO		Richardson Texas	Lincoln, Christine	Price, Terry	Business Development/Completed Follow-up	FAX: 972-744-9988	
CEO/GM survey	Terry Price		Grande Communications, Inc.	Morrow, William E. (Bill)	Vice Chairman/Chief Executive Officer		San Marcos Texas		Price, Terry	Business Development/Sent Information	bmorrow@grandecom.com	
CEO/GM survey	Terry Price		INET Technologies, Inc.	Akilian, Elie S.	President/CEO		Richardson Texas	McNamara, James	Price, Terry	Business Development/Completed Follow-up	FAX: 469-330-4001	
CEO/GM survey	Terry Price		InnerWireless, Inc.	Cantwell, Ed	Chief Executive Officer		Richardson Texas	Stack, Frances V.	Price, Terry	Business Development/Left Message	cantwell@innerwireless.net	
CEO/GM survey	Terry Price		Institut International Des Telecommunications	Brunel, Louis	President/CEO		Montreal Quebec Canada	Piche, Jerome			louis.brunel@iitelcom.com	
CEO/GM survey	Terry Price		InteCom, Inc.	Lecat, Philippe	Chief Executive Officer		Addison Texas	Stagiaire, S.	Price, Terry	Business Development/Left Message	FAX:	
CEO/GM survey	Terry Price		Intervoice, Inc.	Brandenburg, David W.	Chairman of the Board/Chief Executive Officer		Dallas Texas	Canoose, Tammi	Price, Terry	Business Development/Sent Information	dbrandenburg@intervoice-brite.com	
CEO/GM survey	Terry Price		IP Communications	Nowick, Steven P. (Steve)	President/Chief Executive Officer		Dallas Texas	Gross, Sandy	Price, Terry	Business Development/Completed Follow-up	snowick@ip.net	snowick@earthlink.net
CEO/GM survey	Terry Price		IPVoice Communications, Inc.	Verges, Philip	Chairman/CEO		Dallas Texas		Price, Terry	Business Development/Left Message	philip@ipvoice.com	
CEO/GM survey	Terry Price		JP Mobile, Inc.	Puskoor, Dayakar	Chief Executive Officer/Founder		Dallas Texas	Berot, Loren	Price, Terry	Business Development/Completed Follow-up	dayakar.puskoor@jpmobile.com	9373605@skytel.com
CEO/GM survey	Terry Price		LightCross, Inc.	Barron, Robert L. (Bob)	Chief Executive Officer		Monterey Park California	Lambele, Tracey	Fennessy, Heather	Business Development/Completed Follow-up	bob@lightcross.com	
CEO/GM survey	Terry Price		Lightpointe Communications, Inc.	Griffin, John	President/CEO		San Diego California	Ellers, Jessica	Price, Terry	Business Development/Left Message	jgriffin@lightpointe.com	

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CEO/GM survey	Terry Price		Metro-Optix, Inc.	Orr, David E. (Dave)	President/Chief Executive Officer		Allen Texas	Jones, Sarah	Price, Terry	Business Development/Sent Information		deorr@mindspring.com
CEO/GM survey	Terry Price		Microtune, Inc.	Bartek, Douglas J. (Doug)	Chairman/CEO		Plano Texas	Soon, Deborah	Price, Terry	Business Development/Completed Follow-up	doug.bartek@microtune.com	
CEO/GM survey	Terry Price		Navini Networks, Inc.	Westgarth, Alastair	Chief Executive Officer		Richardson Texas	Alexander, Hilary	Price, Terry	Business Development/Completed Follow-up	awestgarth@navini.com	
CEO/GM survey	Terry Price		Netensity, Inc.	Harris, K. A. (Arlan)	President/Chief Executive Officer		Plano Texas	Colsch, Carrie	Price, Terry	Business Development/Completed Follow-up	aharris@netensity.com	aharris@verizon.net
CEO/GM survey	Terry Price		Netrake Corporation	Mader, Tom	Chief Executive Officer		Plano Texas		Price, Terry	Business Development/Completed Follow-up	tom@netrake.com	
CEO/GM survey	Terry Price		Nucentrix Broadband Networks, Inc.	McHenry, Carroll D.	President/CEO		Carrollton Texas	Cruse, Dan			cmchenry@nucentrix.net	
CEO/GM survey	Terry Price		OnFiber Communications, Inc.	Bottoms, Danny	President/Chief Executive Officer		Austin Texas		Price, Terry	Business Development/Completed Follow-up	dbottoms@onfiber.com	
CEO/GM survey	Terry Price		PremiseNET, Inc.	Koons, Sr., Patrick R. (Pat)	Chief Executive Officer		Austin Texas	Price, Terry			pkoons@Premisenet.com	prkoons@aol.com
CEO/GM survey	Terry Price		Sage Telecom, Inc.	Houlihan, Dennis M. (Denny)	Chief Executive Officer		Allen Texas		Price, Terry	Business Development/Completed Follow-up	FAX:	
CEO/GM survey	Terry Price		Santera Systems, Inc.	Heard, David W. (Dave)	Chief Executive Officer		Plano Texas	Honda, Chiyo	Price, Terry	Business Development/Completed Follow-up	david.heard@santera.com	
CEO/GM survey	Terry Price		SES Americom	Olmstead, Dean Allen.	President/Chief Executive Officer		Princeton New Jersey	Price, Terry			dean.olmstead@ses-amicom.com	Dnolmstead@aol.com
CEO/GM survey	Terry Price		Siemens Information & Communication Mobile (ICM)	Levy, Isaac	Vice President/General Manager-Digital Products	General Management	Austin Texas	Carmichael, Christine			isaac.levy@icm.siemens.com	allenloran655@cs.com
CEO/GM survey	Terry Price		SkyCross, Inc.	Haase, Alan L.	President and Chief Executive Officer		Melbourne Florida	Beuerlein, David			alan.haase@skycross.com	haase@home.com
CEO/GM survey	Terry Price		Spatial Wireless, Inc.	Andersson, Kjell S. (Shell)	President & CEO		Richardson Texas	Jones, Sarah	Price, Terry	Business Development/Completed Follow-up	kandersson@omni-point.com	kjells@kissingcamels.com
CEO/GM survey	Terry Price		SPEAKEASY.net	Apgar, Michael Mike. (D.)	President/Chief Executive Officer		Seattle Washington	Price, Terry			mike@speakeasy.net	
CEO/GM survey	Terry Price		Sunbelt Telecommunications, Inc.	Mann, Paula	President/CEO		Allen Texas		Price, Terry	Business Development/Left Message	FAX: 972-727-8831	

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CEO/GM survey	Terry Price		Tekelec, Inc.	Margolis, Michael L. (Mike)	President/CEO		Calabasas California	Honda, Chiyo	Price, Terry	Business Development/Sent Information	karolyn.flesher@tekelec.com	
CEO/GM survey	Terry Price		Telcordia Technologies, Inc.	Desch, Matthew J. (Matt)	Chief Executive Officer		Morristown New Jersey	Honda, Chiyo	Price, Terry	Business Development/Sent Information	mdesch@telcordia.com	mdesch@mindspring.com
CEO/GM survey	Terry Price		Telesoft, Inc.	Venkatesetty, Pradeep	Chief Executive Officer		Dallas Texas		Price, Terry	Business Development/Sent Information	pradeepv@telesoftinc.com	
CEO/GM survey	Terry Price		Teloptica, Inc.	Bernique, Michael R.	Chief Executive Officer		Richardson Texas	Langdon, Kristine	Beuerlein, David	Business Development/Left Message	mrbernieque@TelOptica.com	mrbernieque@aol.com
CEO/GM survey	Terry Price		The Telemetry Company	Dobell, Colin	Founder/President/CEO		Dallas Texas		Price, Terry	Business Development/Met		cdobell@attglobal.net
CEO/GM survey	Terry Price		TrinTel Communications, Inc.	Day, John	President/CEO/Chairman of the Board		Irving Texas		Price, Terry	Business Development/Sent Information	jday@trintel.com	jday61@hotmail.com
CEO/GM survey	Terry Price		T-Speed Broadband Communications, Inc.	Varel, N. Mark.	Founder/President/CEO		Dallas Texas		Price, Terry	Business Development/Completed Follow-up	mvarel@t-speed.com	
CEO/GM survey	Terry Price		Valor Telecommunications, LLC	Cole, Kenneth R. (Ken)	Chief Executive Officer		Irving Texas	Orlich, Amy	Todd, Teryn	Business Development/Met	kcole@valortelecom.com	
CEO/GM survey	Terry Price		Varros Telecom LLC	Negandhi, Shailesh	Co-Founder/CEO		Addison Texas		Price, Terry	Business Development/Sent Information	FAX: 972-503-8885	
CEO/GM survey	Terry Price		VarTec Telecom, Inc.	Mitchell, Jr., A. Joe	Chief Executive Officer		Dallas Texas		Price, Terry	Business Development/Completed Follow-up		
CEO/GM survey	Terry Price		Viyu Communications, Inc.	Schriewer, Randy A.	Chief Executive Officer		Dallas Texas	Urbain, Peter	Price, Terry	Business Development/Sent Information	randy@viyu.net	randy404@earthlink.net
CEO/GM survey	Terry Price		VocalData, Inc.	Camp, Michael	Chief Executive Officer		Richardson Texas	Visbal, Jonathan	Price, Terry	Business Development/Meeting Scheduled	mcamp@vocaldata.com	
CEO/GM survey	Terry Price		Weblink Wireless, Inc.	Buckenham, N. Ross	Chairman/President/Chief Executive Officer		Dallas Texas	Scanlan, Thomas	Price, Terry	Business Development/Met	ross.buckenham@weblinkwireless.com	
CEO/GM survey	Terry Price		Westell Technologies, Inc.	Cullens, E. Van.	Chief Executive Officer		Aurora Illinois	Jones, Sarah			vcull@westell.com	cullens01@aol.com
CEO/GM survey	Terry Price		White Rock Networks, Inc.	Martin, William (Lonnie)	CEO/Founder		Richardson Texas	Fisch, Stephanie	Price, Terry	Business Development/Completed Follow-up	lmartin@whiterocknetworks.com	
CEO/GM survey	Terry Price		Xalted Networks, Inc.	Phillips, Timothy D. (Tim)	Co-Founder/President		Plano Texas		Price, Terry	Business Development/Left Message	FAX: 972-202-8100	
CEO/GM survey	Terry Price		Cisco Systems, Inc.	Martin, Ronald (Ron)	VP/GM-Optical Networking Group	General Management	San Jose California	Langford, Cindy	Price, Terry	Business Development/Sent Information	ron.martin@fnc.fujitsu.com	
CEO/GM survey	Tom Scanlan		Broadbeam Corporation	Boudris, Janet L.	CEO		Princeton New Jersey					

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CEO/GM survey	Tom Scanlan		Ericsson Communications, Inc. (EMC)	Henderson, Mark	President/CEO C		Mississauga Ontario Canada		Hauswirth, Jeff	Business Development/	mhliscel@hotmail.com	
CEO/GM survey	Tom Scanlan		Evolution Networks, Inc.	Ensor, Eric F.	President/CEO		Atlanta Georgia				eensor@evnetworks.com	eensor@bellsouth.net
CEO/GM survey	Tom Scanlan		Fairfax Advisors	Hartin, John J.	Founder		Fairfax Virginia				jhartin@omnipoint-pcs.com	jhartin101@aol.com
CEO/GM survey	Tom Scanlan		GeoWorks, Inc.	Grannan, David (Dave)	Chairman		Alameda California				dgrannan@geoworks.com	
CEO/GM survey	Tom Scanlan		Iridium Satellite LLC	Picasso, Gino O.	President/Chief Executive Officer		Reston Virginia					
CEO/GM survey	Tom Scanlan		KMC Telecom Holdings	Lenahan, William F. (Bill)	Chief Executive Officer		Bedminster New Jersey				Wlenahan@monmouth.com	
CEO/GM survey	Tom Scanlan		Leap Wireless International, Inc.	Davis, David B.	Vice President/GM-Central Region	General Management	Tulsa Oklahoma	Gorman, Alexis			ddavis@cricketcommunications.com	
CEO/GM survey	Tom Scanlan		MediaOne International (USA)	Ames, Gary	President/CEO		Englewood Colorado					agames@home.com
CEO/GM survey	Tom Scanlan		M-Qube, Inc.	Glass, Jeffrey R. (Jeff)	Chief Executive Officer		Boston Massachusetts					jglass@travelers-netplus.com
CEO/GM survey	Tom Scanlan		Novar PLC	Ashby, Ian G.	Chief Executive Intelligence Building Systems Div		Weybridge Surrey Great Britain		Whyte, Arlette	Business Development/	ian_ashby@novar.com	familyashby@hotmail.com
CEO/GM survey	Tom Scanlan		Protegrity, Inc.	Nevins, Scott C.	President/CEO		Stamford Connecticut					scnevins@yahoo.com
CEO/GM survey	Tom Scanlan		Scala Business Solutions N.V.	Houle, Chris	Chairman-Management Board		AMSTERDAM Netherlands				houlenl@att.global.net	
CEO/GM survey	Tom Scanlan		Tellaire Corporation	Bailey, Leah S.	President/CEO		Dallas Texas					ralbailey@aol.com
CEO/GM survey	Tom Scanlan		Terion Communications	Locke, Jeffrey C. (Jeff)	President/Chief Executive Officer		Melbourne Florida				LIBBY767@aol.com	whitepelican@aol.com
CEO/GM survey	Tom Scanlan		ViAir	Chatterley, Bruce	CEO		Seattle Washington				brucec@concur.com	
CEO/GM survey	Tom Scanlan		Weblink Wireless, Inc.	Buckenham, N. Ross	Chairman/President/Chief Executive Officer		Dallas Texas		Price, Terry	Business Development/Met	ross.buckenham@weblinkwireless.com	
CEO/GM survey	Tom Scanlan/John Keller		Covad Communications, Inc.	Hoffman, Charles E. (Charlie)	President/CEO		Santa Clara California		Price, Terry	Business Development/Sent Information	choffman@rci.rogers.com	
CEO/GM survey		Bruce Lachenauer	Novatel Wireless, Inc.	Major, John E.	Chairman/Chief Executive Officer	General Management	San Diego California	Visbal, Jonathan	Gostyla, Richard	Business Development/	jmajor@novatelwireless.com	
CEO/GM survey		Debbie Soon	Alacritech	Boucher, Laurence B. (Larry)	President/Chief Executive Officer/Founder	General Management	San Jose California	Soon, Deborah				
CEO/GM survey		John Keller	Broadband Venture Partners, LLC	Schleyer, William T. (Bill)	General Partner	General Management	Dallas, Texas	Keller, John	Sintes, Gustavo		bschleyer@pilotouse.com	
CEO/GM survey		John Keller	Broadwing, Inc.	Ellenberger, Richard G. (Rick)	President/Chief Executive Officer/Chairman	General Management	Cincinnati, Ohio	Keller, John	Sintes, Gustavo		rgellenberger@hotmail.com	
CEO/GM survey		Nayla Rizk	Archway Digital Systems, Inc.	Heil, Michael D. (Mike)	Chief Executive Officer	General Management	Mountain View, California	Citrin, James	Sintes, Gustavo			HeilMD@aol.com

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CEO/GM survey		Nayla Rizk	Telcordia Technologies, Inc.	Desch, Matthew J. (Matt)	Chief Executive Officer	General Management	Morristown, New Jersey	Render, Don	Sintes, Gustavo		mdesch@telcordia.com	mdesch@mindspring.com
CEO/GM survey		Nayla Rizk	Currenex, Inc.	Mirek, Lori P.	President & CEO Founder		Menlo Park California				lori.mirek@currenex.com	loripmirek@hotmail.com
CEO/GM survey		Nayla Rizk	Tesaria, Inc.	Billings, George H.	Vice Chairman	General Management	San Jose California	Scanlan, Thomas			ginnie_defer@symmetrycomm.com	capegeorge@earthlink.net
CEO/GM survey		Terry Price	Kyocera Wireless Corporation	Speaks, Jr., Howard W. (Skip)	Chief Executive Officer		San Diego California	Floyd, Jennifer			sspeaks@kyocera-wireless.com	skip@silcon.com
CEO/GM survey		Terry Price	Nuera Communications, Inc.	Ingram, William (Bill)	President/Chief Executive Officer		San Diego California	Piche, Jerome	Price, Terry	Business Development/Sent Information	wingram@nuera.com	
CEO/GM survey		Terry Price	Larscom, Inc.	Scharre, Daniel L. (Dan)	Chief Executive Officer		Milpitas California	Fisch, Stephanie	Price, Terry	Business Development/Completed Follow-up	dscharre@larscom.com	dscharre2@earthlink.net
CEO/GM survey		Tom Scanlan??	Covad Communications, Inc.	Hoffman, Charles E. (Charlie)	President/CEO		Santa Clara California		Price, Terry	Business Development/Sent Information	choffman@rci.rogers.com	
CEO/GM survey		Tom Scanlan	Empower Interactive	Shearer, Richard	CEO		London Great Britain				richard@eigroup.com	richshearer@hotmail.com
CEO/GM survey		Tom Scanlan	Ericsson Communications, Inc. (EMC)	Henderson, Mark	President/CEO C	General Management	Mississauga Ontario Canada	Scanlan, Thomas	Hauswirth, Jeff	Business Development/	mhliscel@hotmail.com	
CEO/GM survey		Tom Scanlan	Exi Wireless, Inc.	Khoja, Karim Jadavjee.	Chairman and Chief Executive Officer		Richmond British Columbia Canada				kkhoja@exi.com	karimkhoja@hotmail.com
CEO/GM survey		Tom Scanlan	Midwest Wireless	Dennis Miller	President & CEO		Mankato, MN		John Keller	Business Development	dmiller@midwestwireless.com	
CEO/GM survey		Tom Scanlan	Quintessent Communications, Inc.	Brian Vincent	Chairman/President/Chief Executive Officer		Seattle, WA				bvincent@quintessent.com	shannonvincent@attbi.com

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BU/HR survey	Bruce Lachenauer		AirEdge, Inc.	Bischoff, John H.	President	General Management	San Diego California	Smith, Shellie			bisch@accessbee.com	
BU/HR survey	Bruce Lachenauer		Aqcess Technologies, Inc.	Kohl, Jeffrey D.	Chief Operating Officer/Vice President-Operations/Director-Strategic Alliances	General Management	Irvine California					jeffkohl@earthlink.net
BU/HR survey	Bruce Lachenauer		IPITEK	AuYeung, John	EVP/Chief Operating Officer	General Management	Carlsbad California	Smith, Shellie			jauyeung@ipitek.com	jcauyeung@aol.com
BU/HR survey	Bruce Lachenauer		IPITEK	Coykendall, Kent R.	Vice President-Operations/Business Development	General Management	Carlsbad California				kcoykendall@airwalk.com	kentcoykendall@yahoo.com
BU/HR survey	Bruce Lachenauer		Lightpointe Communications, Inc.	Ghuman, Baksheesh S.	Vice President/Managing Director-SE Asia Operation	General Management	San Diego California	Whitehead, Anna				BaksheeshSGhuman@aol.com
BU/HR survey	Bruce Lachenauer		Novatel Wireless, Inc.	Plachno, Ron	Senior Vice President-Manufacturing	General Management	San Diego California	Turner, Kimberly				plachnor@aol.com
BU/HR survey	Bruce Lachenauer		NStor Technologies	Makmann, M. (Thomas)	President/COO	General Management	San Diego California	Higgins, Yukari			tmakmann@nstor.com	tmakmann@att.net
BU/HR survey	Bruce Lachenauer		Platforms Wireless International Corporation	Draper, François M.	Executive Vice President/COO/Chief Technical Officer	General Management	San Diego California					fmdraper@hotmail.com
BU/HR survey	Bruce Lachenauer		QUALCOMM, Inc.	Sulpizio, Richard	President/COO	General Management	San Diego California	Buckley, James	Gostyla, Richard	Business Development/	sulpizio@qualcomm.com	
BU/HR survey	Bruce Lachenauer		QUALCOMM, Inc.	May, Derek R.	President-Qualcomm Personal Electronics	General Management	San Diego California	Visbal, Jonathan			dmay@qualcomm.com	
BU/HR survey	Bruce Lachenauer		QUALCOMM, Inc.	Haile, Kimberly (Kim)	SVP/President-Digital Media	General Management	San Diego California	Behar, Dana			khaile@qualcomm.com	
BU/HR survey	Bruce Lachenauer		QUALCOMM, Inc.	Beckwith, Gerald L. (Jerry)	SVP/President-Wireless Systems	General Management	San Diego California	Berhau, Louise			beckwith@qualcomm.com	
BU/HR survey	Bruce Lachenauer		QUALCOMM, Inc.	Laun, Susan	VP-Human Resources	Human Resources/Personnel	San Diego California	Bruce, Michael			slaun@qualcomm.com	
BU/HR survey	Bruce Lachenauer		QUALCOMM, Inc.	Uhlig, Ronald P.	VP-Russia	General Management	San Diego California	Amador, Renato				r.uhlig@worldnet.att.net
BU/HR survey	Bruce Lachenauer		SkyRiver Communications	Gopadze, Lee	President/COO	General Management	San Diego California	Langdon, Kristine			lee@skyriver.com	
BU/HR survey	Bruce Lachenauer		Sympra Fiber Links	Clover, Michael J. (Mike)	President	General Management	San Diego California	Kesselman, Jennifer				mclover444@aol.com
BU/HR survey	Bruce Lachenauer		Tachyon, Inc.	Ontañon, Santiago	Vice President-Corporate Development	General Management	San Diego California	Sierra, Vanessa				santiago@stanfordalumni.org

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BU/HR survey	Bruce Lachenauer		Verio, Inc.	Stewart, Michael C. (Mike)	President-Enterprise Broadband Services	General Management	San Diego California	O'Sullivan, Jim			mcstewart@verio.net	
BU/HR survey	Bruce Lachenauer		Wireless Facilities, Inc.	Fox, Scott	President	General Management	San Diego California	Kenvin, Mina			scott.fox@wfinet.com	
BU/HR survey	Bruce Lachenauer		WirelessKnowledge, LLC	Blair, Shelly	V.P., Human Resources	Human Resources/Personnel	San Diego California	Pickens, Felicia	Bruce, Michael	Business Development/BD Initiated by Client	sblair@wirelessknowledge.com	
BU/HR survey	Don Render		ALLTEL Corporation	Owen, Elisabeth J.	Market Area President-Southeast		Columbia South Carolina					eowenglenn@aol.com
BU/HR survey	Don Render		BellSouth Corporation	Harris, Jr., Isaiah (Ike)	President-Consumer Services		Atlanta Georgia				ike.harris@bellsouth.com	
BU/HR survey	Don Render		Broadwing, Inc.	Mooney, Kevin W.	Chief Operating Officer		Cincinnati Ohio				kevin.mooney@broadwing.com	
BU/HR survey	Don Render		Dobson Communications Corporation	Tanner, Steven (Steve)	Regional Vice President-Dobson Cellular Systems		Oklahoma City Oklahoma				steve.tanner@dobson.net	
BU/HR survey	Don Render		United States Cellular, Inc.	Marino, Frank A.	VP-West/Southwest Region (Tulsa)		Tulsa Oklahoma				Frank.Marino2@uscellular.com	
BU/HR survey	John Keller		AT&T Corporation	Graddick-Weir, Ph.D., Mirian M.	Executive Vice President-Human Resources	Human Resources/Personnel	New York, New York		Sintes, Gustavo		mgradick@ems.att.com	
BU/HR survey	John Keller		BellSouth Corporation	Forsee, Gary D.	President-Domestic Operations	General Management	Atlanta, Georgia	Gregor, Donna	Sintes, Gustavo		gary.forsee@bellsouth.com	garyforsee@aol.com
BU/HR survey	John Keller		Broadwing Communications	Chidester, Jack	President-Business Enterprises	General Management	Cincinnati, Ohio	Keller, John	Sintes, Gustavo		Jchidester@winstar.com	
BU/HR survey	John Keller		CenturyTel, Inc.	Puckett, Karen	EVP & COO	General Management	Monroe, Louisiana	Keller, John	Sintes, Gustavo			karenpuckett@hotmail.com
BU/HR survey	John Keller		Hughes Electronics Corporation	Hartenstein, Eddy W.	President, DirecTV	General Management	El Segundo, California	Daum, Julie	Sintes, Gustavo		eddy@directv.com	
BU/HR survey	John Keller		Lucent Technologies, Inc.	Styring, Jim	President-Services/Systems-Global Svcs Provider	General Management	Murray Hill, New Jersey	Young, Nick	Sintes, Gustavo			jimstyring@aol.com
BU/HR survey	John Keller		Lucent Technologies, Inc.	Miller, Richard S. (Rick)	SVP-Global Sales Operations	Sales	Murray Hill, New Jersey	Small, Elaine	Sintes, Gustavo		rick@opus360.com	ricksmiller@msn.com
BU/HR survey	John Keller		Parsons Brinckerhoff Telecommunications	Bellhouse, Robert E. (Bob)	Chief Operating Officer	General Management		Woodley, Paula	Sintes, Gustavo			
BU/HR survey	John Keller		Radware, Inc.	Desai, Vikram K. (Vik)	Chief Operating Officer	General Management	Mahwah, New Jersey	Render, Don			vikd@radware.com	vikram_k_desai@hotmail.com
BU/HR survey	John Keller		WorldCom, Inc.	Huyard, Wayne E.	Chief Operating Officer MCI Group	General Management	Clinton, Mississippi	Nielsen, Eric C.	Sintes, Gustavo		wayne.huyard@worldcom.com	
BU/HR survey	John Keller		WorldCom, Inc.	Crane, Jonathan C.	President-US Sales/Marketing/Services	Sales	Clinton, Mississippi	Price, Terry	Sintes, Gustavo		jonathan.crane@adaro.com	
BU/HR survey	John Keller		WorldCom, Inc.	Stupka, John T.	President-Wireless Solutions/Ventures/Alliances	General Management	Clinton, Mississippi	Carey, Dennis C.	Sintes, Gustavo		john.stupka@worldcom.com	
BU/HR survey	John Keller		XO Communications, Inc.	Davis, Nathaniel (Nate)	President/Chief Operating Officer	General Management	Reston, Virginia	McLean, E. Peter	Sintes, Gustavo		nate.davis@nextel.com	

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BU/HR survey	John Keller		Lucent Technologies, Inc.	O'Shea, William T. (Bill)	Chief Technology Officer	Information Technology (MIS)	Murray Hill, New Jersey	Ochoa, Stacey	Sintes, Gustavo		woshea@lucent.com	
BU/HR survey	Lee Esler		BellSouth Corp.	Val Markos	Director-Executive Development							
BU/HR survey	Lee Esler		Cingular Wireless	Rickford (Rick) Bradley	SVP-HR							
BU/HR survey	Lee Esler		Earthlink	Ken Uhlig	SVP-HR							
BU/HR survey	Lee Esler		EarthLink, Inc.	Greg Stromberg	EVP - Employee Services							
BU/HR survey	Lee Esler		Equant, Inc.	John Kubisch	SVP-HR							
BU/HR survey	Lee Esler		Equant, Inc.	Bruce Smith	SVP-Markets/Sales, North America							
BU/HR survey	Lee Esler		Nokia, Inc.	Eliane Hall	VP-HR							
BU/HR survey	Nayla Rizk		Bell Mobility Cellular, Inc.	Healey, Paul	VP-Bell Mobility/President-Bell Mobility,Western R		Vancouver British Columbia Canada				phealey@mobility.com	
BU/HR survey	Nayla Rizk		Cingular Wireless	Pappas, George	COO-Cingular Interactive	General Management	Atlanta Georgia	McNamara, James			george.pappas@cingular.com	
BU/HR survey	Nayla Rizk		Wildfire Communications	Laakso, Mel	President	General Management	Lexington Massachusetts	Nozaki, Keiko			Mel_Laakso@wildfire.com	
BU/HR survey	Terry Price		Alcatel Americas	Quigley, Michael (Mike)	President/EVP		Plano Texas	Honda, Chiyo			mike.quigley@usa.alcatel.com	
BU/HR survey	Terry Price		Alcatel USA, Inc.	Wood, Joyce	Director, Human Resources	Human Resources/Personnel	Plano Texas		Price, Terry	Business Development/Met	joyce.wood@alcatel.com	
BU/HR survey	Terry Price		Alcatel USA, Inc.	Vogeler, Patrick J. (Pat)	Senior Vice President, Human Resources - Alcatel	Human Resources/Personnel	Plano Texas	Rizk, Nayla	Price, Terry	Business Development/Met	pat.vogeler@usa.alcatel.com	
BU/HR survey	Terry Price		Alliance Systems, Inc.	Cone, III, Charles N. (Rusty)	President	General Management	Plano Texas		Price, Terry	Business Development/Completed Follow-up	rusty.cone@alliancesystems.com	
BU/HR survey	Terry Price		CellStar Corporation	Campbell, Scott A.	Director, Human Resources & Employee Services	Human Resources/Personnel	Carrollton Texas	Price, Terry	Price, Terry	PNB	scampbell@cellstar.com	
BU/HR survey	Terry Price		Clearwire	Cyr, Leo J.	President/Chief Operating Officer	General Management	Arlington Texas	Fisch, Stephanie	Price, Terry	Business Development/Left Message	lcyr@clearwire.com	
BU/HR survey	Terry Price		CMG Wireless Data Solutions (US)	Nelton, DeWayne A.	President-North America	General Management	Addison Texas	Price, Terry			dewayne.nelton@cmg-usa.com	nelton@concentric.net
BU/HR survey	Terry Price		Corban Communications	Sutton, George	Chief Operating Officer	General Management	Plano Texas	Wasson, Thomas W.			gsutton@corbanco.com	
BU/HR survey	Terry Price		Covad Communications, Inc.	Davenport, III, Robert R. (Rob)	President-International Operations		Santa Clara California	Fortney, Ray A.				rob@rd-partners.com
BU/HR survey	Terry Price		Efficient Networks, Inc.	Hamilton, James A.	President		Dallas Texas	Gibson, Michelle	Price, Terry	Business Development/Sent Information	FAX: 972-852-1001	

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BU/HR survey	Terry Price		Equant Network Services, Inc	Uhlig, Ken	Senior Vice President-Human Resources	Human Resources/Personnel	Atlanta Georgia	Price, Terry	Price, Terry	Business Development/Sent Information	ken.uhlig@equant.com	
BU/HR survey	Terry Price		<u>Ericsson, Inc.</u>	<u>Carlson, Ann</u>	<u>Human Resources Manager</u>	<u>Human Resources/Personnel</u>	<u>Richardson Texas</u>		<u>Price, Terry</u>	<u>Business Development</u>	<u>ann.carlson@ericsson.com</u>	
BU/HR survey	Terry Price		Fujitsu Network Communications, Inc.	Chase, George B.	Group President/Chief Operating Officer	General Management	Richardson Texas	Jones, Sarah	Price, Terry	Business Development/Sent Information	gchase@hookpartners.com	
BU/HR survey	Terry Price		<u>INTELSAT Ltd.</u>	<u>Kullman, Conny L.</u>	<u>Director General & CEO</u>		<u>Washington District of Columbia</u>	<u>Price, Terry</u>	<u>Price, Terry</u>	<u>Business Development/Completed Follow-up</u>	<u>conny.kullman@intelsat.int</u>	
BU/HR survey	Terry Price		<u>INTELSAT Ltd.</u>	Bostick, Carrolyn	Human Resources	Human Resources/Personnel	Washington District of Columbia		Price, Terry	Business Development/Completed Follow-up	carrolyn.bostick@intelsat.int	
BU/HR survey	Terry Price		<u>Intervoice, Inc.</u>	<u>Ritchey, Robert E. (Bob)</u>	<u>President</u>	<u>General Management</u>	<u>Dallas Texas</u>	<u>Price, Terry</u>	<u>Price, Terry</u>	<u>PNB</u>	<u>bob.ritchey@intervoicebrite.com</u>	
BU/HR survey	Terry Price		<u>Intervoice, Inc.</u>	<u>Brown, H. Donald (Don)</u>	<u>Vice President, Human Resources</u>	<u>Human Resources/Personnel</u>	<u>Dallas Texas</u>	<u>Price, Terry</u>			<u>don.brown@intervoice-brite.com</u>	
BU/HR survey	Terry Price		LaserComm	Georgatos, G. Eric.	President/Chief Operating Officer	General Management	Plano Texas	Price, Terry				georgato@swbell.net
BU/HR survey	Terry Price		Latus Lightworks, Inc.	Baghdasarian, Zareh	Chief Operating Officer	General Management	Richardson Texas	Price, Terry				
BU/HR survey	Terry Price		<u>Santera Systems, Inc.</u>	<u>Cannon, Lynda</u>	<u>Director, People Resources</u>	<u>Human Resources/Personnel</u>	<u>Plano Texas</u>		<u>Price, Terry</u>	<u>Business Development/Completed Follow-up</u>	<u>lynda.cannon@santera.com</u>	
BU/HR survey	Terry Price		<u>Siemens AG</u>	<u>Bellmann, Matthias</u>	<u>Vice President, Human Resources - Information Communication Products</u>	<u>Human Resources/Personnel</u>	<u>Germany</u>	<u>Sendele, H.</u>			<u>matthias.bellmann@mch.siemens.de</u>	
BU/HR survey	Terry Price		<u>Siemens AG Information and Communication Networks</u>	<u>Helfer, Linda</u>	<u>Human Resources Head - International Region</u>	<u>Human Resources/Personnel</u>	<u>Germany</u>		<u>Price, Terry</u>	<u>Business Development/Completed Follow-up</u>	<u>linda.helfer@icn.siemens.de</u>	
BU/HR survey	Terry Price		<u>Siemens Information & Communication Mobile (ICM)</u>	<u>Mounday, Karen H.</u>	<u>Director, ICM Human Resources</u>	<u>Human Resources/Personnel</u>	<u>Austin Texas</u>		<u>Price, Terry</u>	<u>Business Development/Completed Follow-up</u>	<u>karen.mounday@icm.siemens.com</u>	
BU/HR survey	Terry Price		<u>Sprint Corporation</u>	<u>Kelly, Timothy E. (Tim)</u>	<u>President, Sprint Business Global Markets Group</u>	<u>General Management</u>	<u>Overland Park Kansas</u>	<u>Price, Terry</u>			<u>tkelly@tickets.com</u>	
BU/HR survey	Terry Price		<u>Sprint E Solutions</u>	<u>Nanna, Wayne</u>	<u>Area Vice President-Northeast</u>	<u>General Management</u>	<u>Rochelle New Jersey</u>	<u>Price, Terry</u>				<u>wayne_nanna@msn.com</u>
BU/HR survey	Terry Price		<u>Sprint E Solutions</u>	<u>Paglusch, Keith D.</u>	<u>President</u>	<u>General Management</u>	<u>Overland Park Kansas</u>	<u>Price, Terry</u>			<u>kpaglu01@sprintpectrum.com</u>	
BU/HR survey	Terry Price		<u>Sprint Long Distance Division</u>	<u>Walter, Ric</u>	<u>AVP, HR-Long Distance Technology Services Group</u>	<u>Human Resources/Personnel</u>	<u>Overland Park Kansas</u>		<u>Price, Terry</u>	<u>Business Development/Meeting Scheduled</u>	<u>ric.walter@mail.sprint.com</u>	

<u>STATUS</u>	<u>Email</u>	<u>Interview</u>	<u>Company Name - Current Job</u>	<u>Person Name</u>	<u>Position - Current Job</u>	<u>Primary Function - Category - Current Job</u>	<u>Job Location - Current Job</u>	<u>Last Asgn. Contacted by Employee</u>	<u>Last BD Contacted by Employee</u>	<u>Last BD Contact Status/Activity</u>	<u>Email Address 1</u>	<u>Personal Email</u>
BU/HR survey	Terry Price		STARTech Early Ventures	Blanton, Matthew S.	President	General Management	Richardson Texas		Price, Terry	Business Development/Sent g \	matt@startech.org	
BU/HR survey	Terry Price		Tekelec, Inc.	Pippin, Teresa A.	Vice President, Human Resources	Human Resources/Personnel	Calabasas California		Price, Terry		FAX: ?	
BU/HR survey	Terry Price		Xtera Communications	DeWilde, Carl	Chief Operating Officer	General Management	Allen Texas	Jones, Sarah	Price, Terry	Business Development/Left Message	cdewilde@xtera.com	cdewilde@home.com
BU/HR survey	Terry Price		Yotta Networks, Inc.	Ulrich, Fritz	Chief Operating Officer	General Management	Plano Texas	Berot, Loren	Price, Terry	Business Development/Completed Follow-up	fulrich@yottanetworks.com	
BU/HR survey	Tom Scanlan		Aether Systems, Inc.	Lupica, Tom	SVP-Wireless Services	General Management	Owings Mills Maryland	Orlich, Amy			tlupica@aethersystems.com	
BU/HR survey	Tom Scanlan		Akamai Technologies, Inc.	Schoettle, Chris	Chief Operating Officer		Cambridge Massachusetts				cschoettle@akamai.com	
BU/HR survey	Tom Scanlan		America Online, Inc.	Patrick, Dennis	President-AOL Wireless		Dulles Virginia					patrickden@aol.com
BU/HR survey	Tom Scanlan		America Online, Inc.	Verba, Jeremy E.	Vice President-Wireless		Dulles Virginia				JeremyVerba@aol.com	jeremeyverba@aol.com
BU/HR survey	Tom Scanlan		Broadwing, Inc.	Cassidy, John F. (Jack)	President/COO-Cincinnati Bell Enterprises		Cincinnati Ohio				jack.cassidy@cinbell.com	
BU/HR survey	Tom Scanlan		Cingular Wireless	Fiedler, Mark L.	President/COO-Wireless Services		Atlanta Georgia					
BU/HR survey	Tom Scanlan		Cingular Wireless	Shaner, Robert W. (Bob)	President-Wireless Operations		Atlanta Georgia					
BU/HR survey	Tom Scanlan		ComScore Networks, Inc.	Ryus, Peter	COO-CeleNetworks, Inc.		Reston Virginia					pryus1@earthlink.net
BU/HR survey	Tom Scanlan		Eircom (UK) Ltd.	Hribar, Herbert R. (Herb)	EVP		London Great Britain				hhribar@verisign.com	
BU/HR survey	Tom Scanlan		Hellman & Friedman LLC	Healy, Patrick J	Managing Director		SF CA					
BU/HR survey	Tom Scanlan		Leap Wireless International, Inc.	Swenson, Susan G. (Sue)	President/Chief Operating Officer/CEO-Cricket/		San Diego California					
BU/HR survey	Tom Scanlan		Leap Wireless International, Inc.	Johnson, Miles	Regional Vice President-Southeast Region	General Management	San Diego California	Orlich, Amy				milesjohnson@pdq.net
BU/HR survey	Tom Scanlan		MDSI Mobile Data Solutions, Inc.	Chew, Gerald (Gerry)	President/COO	General Management	Richmond British Columbia Canada	Scanlan, Thomas				gfchew@worldnet.att.net
BU/HR survey	Tom Scanlan		MDSI Mobile Data Solutions, Inc.	Chew, Gerald (Gerry)	President/COO		Richmond British Columbia Canada					gfchew@worldnet.att.net
BU/HR survey	Tom Scanlan		Microcell Connexions, Inc.	Pancholy, Rajiv	President/Chief Operating Officer		Montreal Quebec Canada				rajiv@pancholy.com	rajiv@pancholy.com
BU/HR survey	Tom Scanlan		Motorola, Inc.	Becknell, Robert H. (Bob)	VP-Global Sourcing		Schaumburg Illinois					rhbecknell@aol.com
BU/HR survey	Tom Scanlan		Network Programs, Inc.	Mace, Richard (Rick)	President/COO		Piscataway New Jersey					
BU/HR survey	Tom Scanlan		o2wireless Solutions, Inc.	Riley, Michael W.	President/Chief Operating Officer	General Management	Atlanta Georgia	Orlich, Amy			rileym1648@aol.com	
BU/HR survey	Tom Scanlan		OmniSky Corporation	Berkowitz, Barak	President		San Francisco California				barak@myself.com	

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BU/HR survey	Tom Scanlan		Rogers AT&T Wireless	Cotton, Douglas C.	President-Ontario Region	General Management	Toronto Ontario Canada	Hirshfeld, Jennifer				dcotton04@home.com
BU/HR survey	Tom Scanlan		SK Group, L.C.	Lee, Michael B. (Mike)	COO		New York New York					MBLM@aol.com
BU/HR survey	Tom Scanlan		SpectraSite Communications	Biltz, Timothy G.	COO	General Management	Cary North Carolina	Orlich, Amy				timbiltz@aol.com
BU/HR survey	Tom Scanlan		Sprint PCS	Geldmacher, Stephen (Steve)	President-Northern Region		Park Ridge Illinois					sgeldm01@aol.com
BU/HR survey	Tom Scanlan		UUNet Technologies, Inc.	Boyne, Kevin	Executive Vice President/Chief Operating Officer		Ashburn Virginia				boyne@uu.net	kevin_boyne@excite.com
BU/HR survey	Tom Scanlan		Arch Wireless, Inc.	Daniels, Lyndon R. (Lyn)	President/Chief Operating Officer		Westborough Massachusetts				ldaniels@arch.com	
BU/HR survey		Bruce Lachenauer	AirFiber, Inc.	Helm, Brett	President/Chief Operations Officer	General Management	San Diego California	Richards, Kristin			bhelm@ipivot.com	
BU/HR survey		Bruce Lachenauer	Ericsson, Inc.	Persson, Ake	President-Ericsson CDMA Systems	General Management	San Diego California	Kenvin, Mina			ake.persson@ericsson.com	
BU/HR survey		Bruce Lachenauer	QUALCOMM, Inc.	Jacobs, Paul	Group President-Wireless/Internet Group	General Management	San Diego California	Kenvin, Mina			pjacobs@qualcomm.com	
BU/HR survey		John Keller	Arch Wireless, Inc.	Daniels, Lyndon R. (Lyn)	President/Chief Operating Officer	General Management	Westborough Massachusetts	Smith, Shellie			ldaniels@arch.com	
BU/HR survey		John Keller	AT&T Corporation	Burlingame, Harold W. (Hal)	EVP-Merger/Joint Venture Integration	Planning & Development	New York, New York	Keller, John	Sintes, Gustavo		hal.burlingame@attws.com	
w		John Keller	AT&T Corporation	Bernard, Betsy J.	President	General Management	New York, New York	Daum, Julie	Sintes, Gustavo		betsy@uswestmail.net	bbernard@att.com
BU/HR survey		Nayla Rizk	Cisco Systems, Inc.	Hill, Wendi	VP-HR Technology Group						wehill@cisco.com	
BU/HR survey		Terry Price	Alcatel USA, Inc.	Morrison, James (Jim)	Vice President, Talent Resources - Human Resources	Human Resources/Personnel	Plano Texas	Price, Terry	Price, Terry	Business Development/Completed Follow-up	jim.morrison@usa.alcatel.com	
BU/HR survey		Tom Scanlan	Akamai Technologies, Inc.	Schoettle, Chris	Chief Operating Officer	General Management	Cambridge Massachusetts	Ellers, Jessica			cschoettle@akamai.com	
BU/HR survey		Tom Scanlan	Akamai Technologies, Inc.	Heinrich, Steve	Vice President-Human Resources	Human Resources/Personnel	Cambridge Massachusetts	Langdon, Kristine	Scanlan, Thomas	Business Development/	steve@akamai.com	
BU/HR survey		Tom Scanlan	AT & T Wireless Services, Inc.	_____, Nancy	Boss of Velamoor, Vijay						?	
BU/HR survey		Tom Scanlan	AT & T Wireless Services, Inc.	Velamoor, Vijay	Director-Staffing	Human Resources/Personnel	Redmond Washington				vijay.velamoor@attws.com	
BU/HR survey		Tom Scanlan	Boingo Wireless	Hagan, David W. (Dave)	President	General Management	Santa Monica California	Tompkins, Suzy	Scanlan, Thomas	Business Development/	dhagan@boingo.com	dwhagan@hotmail.com
BU/HR survey		Tom Scanlan	eVoice, Inc.	Crair, Stanley Bruce (Bruce)	President/COO		Menlo Park California		Ware, John H.	Business Development/		sbcrair@yahoo.com
BU/HR survey		Tom Scanlan	NeuBond	Munnely, Chris	President and Co-Founder		San Ramon California		Scanlan, Thomas	Business Development/	chris.munnely@evoice.com	chrismunnely@aol.com
BU/HR survey		Tom Scanlan/ John Keller	AT & T Wireless Services, Inc.	Bunyan, John A.	Senior Vice President-Mobile Multimedia Services		New York New York				john.bunyan@attws.com	

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BU/HR survey		Tom Scanlan/ John Keller	AT&T Corporation	Constable, Cathy	VP, Marketing Services		Morristown, NJ					

New relationship: _____ Previous relationship: _____ Number of referrals: _____
Issues/any obstacles scheduling interview? (include both + and -)

Resulting/potential new business:

Spencer Stuart

COMMUNICATIONS INDUSTRY LEADERSHIP STUDY

CEO/GM Interview Questions

Ideally, these interviews will be conducted in person, and last approximately 20 minutes. Although the discussion should be somewhat open ended, noting any specifics to each question will also help us to collect results and identify trends among the executives interviewed. Please forward all interview data to Marija Popovic, Knowledge Manager, mpopovic@spencerstuart.com, or mail to Marija's attention, Chicago office.

Interview

1. How is business going....? (This intro. question works well as ice-breaker, and starts discussion flowing)

2. How do you classify your company? (e.g., Wireline, Wireless, Communication Systems, Communication Services, Communication Software)

3. What is your company's size in terms of annual revenue?

4. What are the most important factors that affect your organization's strategy and operating plan? (e.g., Cost Reduction, Improved Product Quality, Improved Customer Service, New Product and Service Development, Key Partnerships/Alliances, New Distribution Channels, Retaining Key Performers, Attracting New Talent, Audit and Control Issues, Other)

5. Is not having a strategy in place to prepare for the upswing of the Communications sector a real roadblock to success or preventing company from achieving any operating goals? Please explain.

6. Based on downsizing that may have resulted in your company, what, if any functional or skill gaps have resulted? (e.g., Audit and Control, Leading Edge Technology, Finance, Human Resources, Marketing, Operations, Sales, Strategy, Other)

7. Do you think you have the right kind of sales talent on board, especially to do what appears to be the need for solution selling?

8. What challenges do you see impacting your ability to attract and retain top talent, now and in the future? (e.g., Company Vision/Strategy, Financial Stability of Organization, Culture of the Organization, Reputation of Management Team, Stature of Members of Board of Directors, Overall Outlook for the Communications Industry, Ability to Differentiate Your Message for Future Growth vs. Competitors, Competitive Compensation Plans, Training and Professional Development, Clearly Delineated Career Path, Cost of Living Locally, Attractive Relocation Package, Quality of Life (i.e. retirement plans, day care, gym membership, etc.), Brand Equity, Other)

9. Is succession planning being given less emphasis? If so, is this because the company is perhaps operating in survival mode?

10. What are the top 5 attributes that you look for when adding or replacing Board Director? (e.g., sitting CEO, retired CEO, Specific Functional Expertise, Public Company Experience, Industry Knowledge, Deep Industry Relationships (i.e. fund-raising, customer development), Diversity, Independence, International Experience, Financial Literacy, Does Not Serve on too Many Boards, Other)

Will You Be Ready? - CEO and GM Survey

Thank you for taking time out of your busy schedule to participate in this study. Be assured that all names will be removed from the results and your responses will be held in strict confidence. Only cumulative results from the total sample will be analyzed. We will not be reporting on comparisons among individual respondents or companies.

1. How would you classify your company? Please select all that apply.

- Wireline
- Wireless
- Communication Systems
- Communication Services
- Communication Software

2. What size is your company?

- \$0 to \$5 M
- \$5 to \$50 M
- \$50 to \$250 M
- \$250 to \$1 B
- Greater than \$1 B

3. What are the most important factors that affect your organization's strategy and operating plan?

Please assign a rating on a scale from 1 to 5 for each, where 1 represents "Least Important" and 5 represents "Most Important".

	1	2	3	4	5
Cost Reduction	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Improved Product Quality	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Improved Customer Service	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
New Product and Service Development	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Key Partnerships/Alliances	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
New Distribution Channels	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Retaining Key Performers	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Attracting New Talent	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Audit and Control Issues	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

3a. Other. Please explain.

4. Based on downsizing that may have resulted in your company, have any of the following functional gaps resulted? Select all that apply.

- Audit and Control
- Cutting Edge Technology
- Finance
- Human Resources
- Marketing
- Operations
- Sales
- Strategy
- Other

4a. Other. Please explain.

5. Which of the following do you think will be issues in attracting/retaining top talent in the future?

Please assign a rating on a scale from 1 to 5 for each, where 1 represents "Not An Issue" and 5 represents "Extremely Important Issue".

	1	2	3	4	5
Company Vision/Strategy	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Financial Stability of Organization	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Culture of the Organization	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Reputation of Management Team	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Stature of Members of Board of Directors	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Overall Outlook for the Communications Industry	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ability to Differentiate Our Message for Future Growth vs. Our Competitors	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Competitive Compensation Plans	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Training and Professional Development	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Clearly Delineated Career Path	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Cost of Living Locally	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Attractive Relocation Package	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Quality of Life (i.e. retirement plans, day care, gym membership, etc.)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Strength of Brand Equity	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

5a. Please explain.

6. If adding or replacing another Board Member, please rank the top 5 attributes that the Board Director should possess:

- Sitting CEO
- Retired CEO
- Specific Functional Expertise
- Public Company Experience
- Industry Knowledge
- Deep Industry Relationships (i.e. fund-raising, customer development)
- Diversity
- Independence
- International Experience

- Financial Literacy
- Does Not Serve on Too Many Boards
- Other

6a. Other. Please explain.

7. If you would like to receive the topline findings of our study, please enter your name and email address. Thank you!

Name

Email

[This questionnaire was created using Perseus SurveySolutions.](#)

Communications Study Survey

CEO/GM Respondents 94 (13 some did not give name)

mike verge	mverge@rogers .com
Murray Swanson	mlswanson@att.net
Patricio Northland	pato@attla.com
Paul	pgjo@msn.com
Pete Thomas	prthomas6@aol.com
Peter V. Lessek	p.lessek@attbi.com
Pierre Brochu	pierre.brochu@connexim.ca
Randy Schriewer	randy@viyu.net
Ricardo A. Diaz	ricar4242@aol.com
Richard Barcus	dick@avansis.com
Richard Chin richard.	h.chin@motorola.com
Richard T. Liebhaber	rtl@liebhber.net
Rick Maule	RMaule@Banderacom.com
Robert Horne	roberthorne@mindspring.com
Roger Keenan	roger1.keenan@ntlworld.com
Ron Grawert	rongrawert@aol.com
sabrina crow	sabrinacro@aol.com
Steve Fowler	sfowler@1ktv.com
Steven Nowick	snowick@ip.net
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Communications Study Survey

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Communications Study Survey

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Executive Summary



Communications Industry Research Study

Spencer Stuart Study Leaders

**John Keller Don Render
Terry Price Tom Scanlan**

Comprehensive Analysis of Communications Companies

Our study has uncovered what Communications executives are thinking about newsworthy issues

Broad Survey

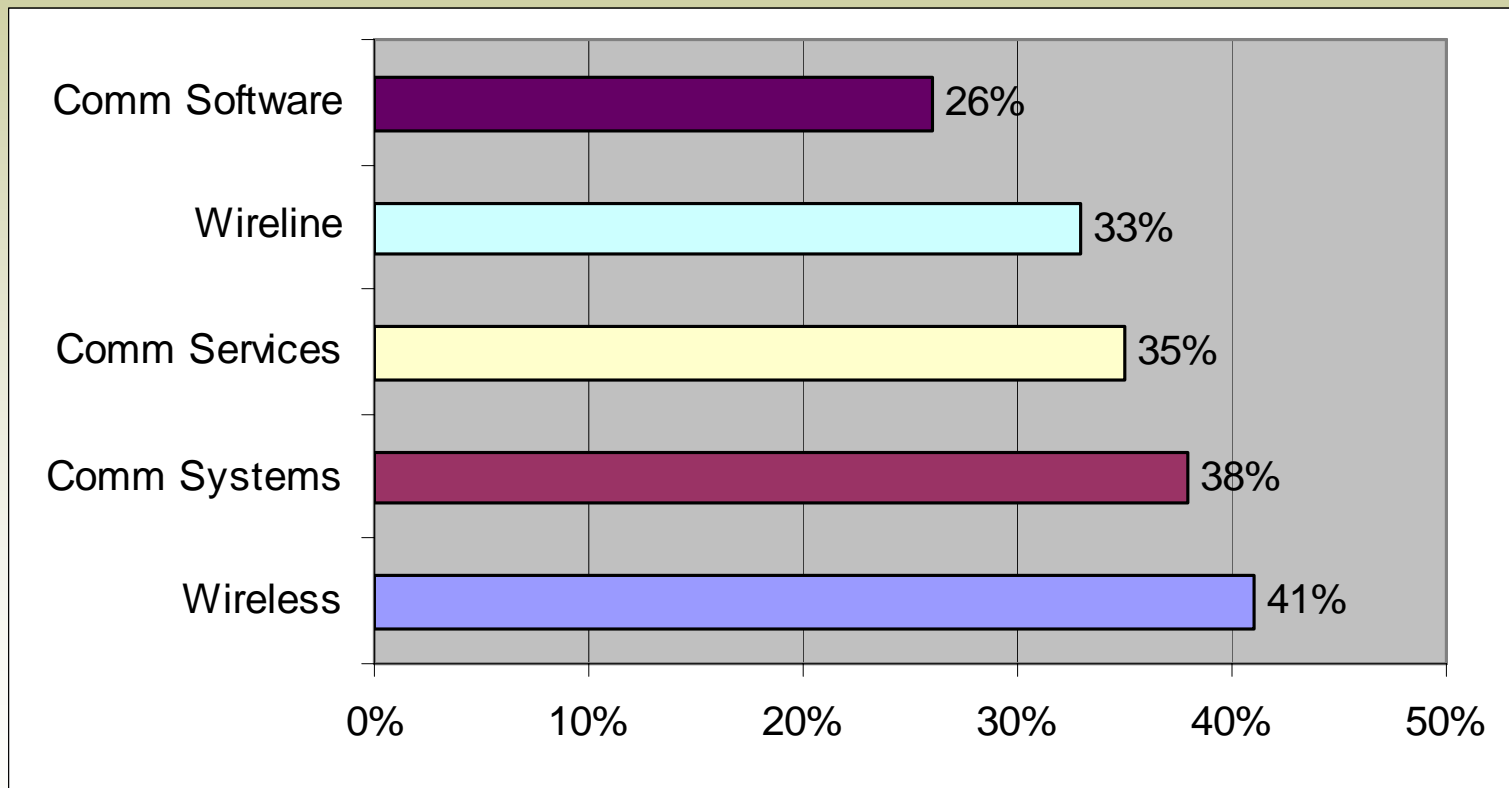
What are the most critical leadership and governance issues facing Communications companies today?

Qualitative Interviews

What are the perceptions and practices of leading Communications CEOs, General Managers and HR Leaders?

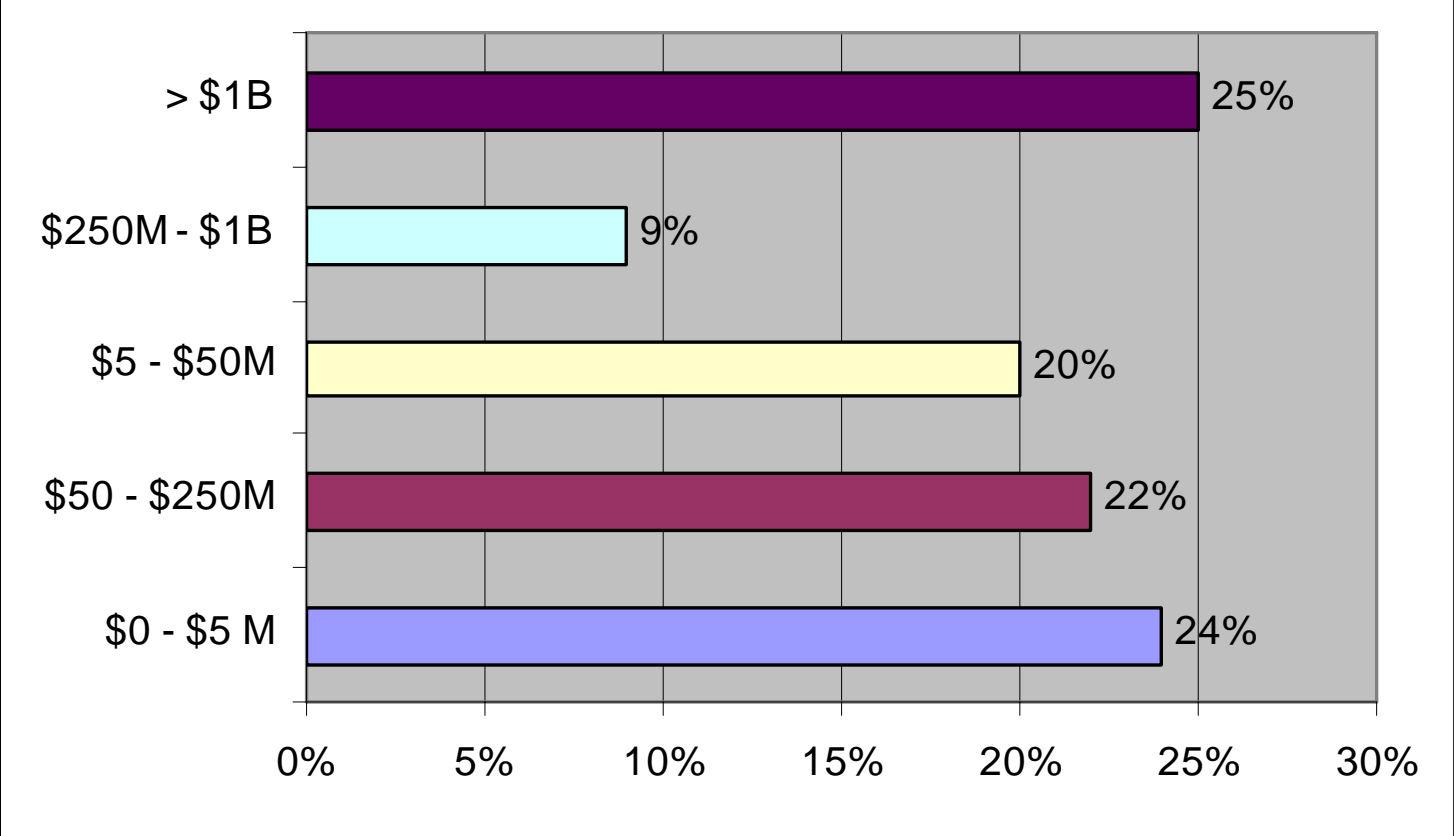
Respondents' Profile

By Industry



Respondents' Profile

By Size



The Most Important Factors Affecting Company Strategy And Operating Plan

CEO Ranking

1. **New Product & Service Development**
2. Key Partnerships/Alliances
3. Retaining Key Performers
4. Improved Customer Service
5. Cost Reduction
6. Improved Product Quality
7. New Distribution Channels
8. Attracting New Talent
9. **Audit & Control Issues**
10. Other

Senior Management Ranking

1. Improved Customer Service
2. **New Product & Service Development**
3. Key Partnerships/Alliances
4. Cost Reduction
5. Improved Product Quality
6. Retaining Key Performers
7. New Distribution Channels
8. Attracting New Talent
9. **Audit & Control Issues**
10. Other

- ⇒ ***Chief focus exists on New Product & Service Development***
- ⇒ ***Audit & Control issues do not appear to be a major influencing factor***

Areas In Which Steps Have Been Taken

Senior Management Ranking

1. **Cost Reduction**
2. Improved Product Quality
3. New Product & Service Development
4. Improved Customer Service
5. Key Partnerships/Alliances
6. Retaining Key Performers
7. **Audit & Control Issues**
8. New Distribution Channels
9. Attracting New Talent
10. Other

⇒ ***Cost Reduction is important as companies continue to control spending***

⇒ ***Question: In light of recent changes in corporate governance (Sarbanes-Oxley), are companies planning to actively address internal Audit & Control and other governance issues?***

Roadblocks To Achieving These Goals

Senior Management Ranking

1. Financial Constraints to Funding & Cost Control Issues
2. Concentrating on Current Critical Issues
3. Industry Partners Internal Challenges Limit Partnerships/Alliances
4. Lack of Resources for Research Development
5. Lack of Internal Talent to Complete Objectives
6. **No Strategy in Place to Prepare for the Upswing of the Communications Sector**
7. Other

⇒ **Question: Do companies already have a strategy in place to prepare for the upswing - or has this question yet to be fully addressed?**

An Acceptable Succession Plan Is In Place For When The CEO Retires

Senior Management Ranking

1	13.80%	<i>Where...</i>
2	27.70%	1 = No Acceptable Plan or Very Unsatisfactory Plan in Place
3	20.00%	
4	29.20%	5 = Very Satisfactory Plan in Place
5	9.20%	

Avg = 2.92

- ⇒ ***41.5% question the adequacy of their company's current succession plan (ranking 1 or 2)***
- ⇒ ***Question: Can companies effectively compete in the upswing and maintain momentum without adequate bench strength and succession planning?***

Functional Gaps That Need To Be Addressed To Gain Competitive Advantage In The Upturn

CEO Ranking

1. Marketing
2. Leading Edge Technology
3. Sales
4. Strategy
5. Human Resources
6. Operations
7. Audit & Control
8. Other
9. Finance

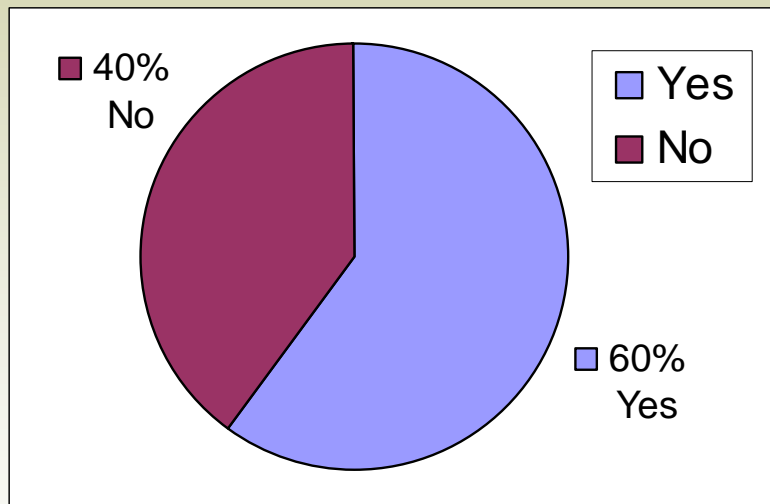
Senior Management Ranking

1. Sales
2. Marketing
3. Leading Edge Technology
4. Operations
5. Strategy
6. Human Resources
7. Finance
8. Other
9. Audit & Control

- ⇒ ***Customer-facing functions are perceived as having the largest gaps***
- ⇒ ***One respondent:*** “There is a definite lack of excellent, aggressive and effective sales people. There are a lot of people interested in a selling position, but the results are just not coming forth.” ***Implication: Is the right sales leadership on board?***

Do You Believe That Your Need For Additional Talent Will Be Different Than Talent Required In Previous Growth Phases?

60% report “Yes,” their need for talent will be different than experienced in previous growth phases



Select respondent comments:

- [There has been a] “cut in R&D.”
- “Moving from R&D to product.”
- “We are moving from an R&D phase to Sales and Deployment.”
- “Need execution, more than R&D.”

⇒ ***There is a strong de-emphasis on R&D. Implication: companies are focusing more on the plan and process to quickly move their product/service into market***

Human Capital Planning and Retention

■ Various carrots are used to retain key members of the team*...

1. Financial Stability of Organization
2. Company Vision/Strategy
3. Reputation of Management Team
4. Ability to Differentiate Our Message for Future Growth vs. Our Competitors
5. Overall Outlook for the Communications Industry
6. Culture of the Organization
7. Competitive Compensation Plans
7. Strength of Brand Equity
8. Stature of Members of Board of Directors
9. Training and Professional Development
10. Clearly Delineated Career Path
11. Cost of Living Locally
12. Quality of Life

...yet only 66% of respondents have worked with CEO/HR head on a comprehensive human capital plan.

Question: Would having this plan in place help provide competitive advantage when the market upturns?

Compensation and Incentive Programs

- The following programs have been initiated or revised to reflect the current economic climate

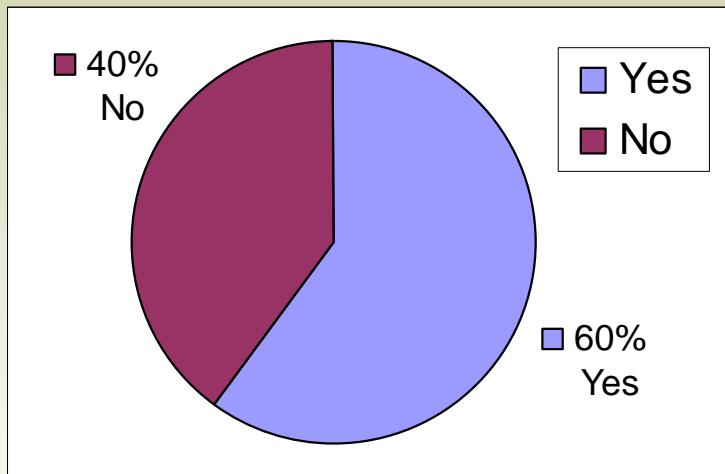
Salary Freeze	70%
Elimination of Bonuses	48%
Bonus Cap	32%
Stock Options in Lieu of Cash	29%
Repricing of Stock Options	28%
Salary Reduction	27%
Creation of Long-Term Incentive Plans	25%
Other	14%
Phantom Stocks	4%

One respondent: “Company was formed after the bubble burst, so most compensation plans are based on current realities.”

Are you currently tracking high-potential performers in your organization?

60% report that the company does track high-potential performers

Select respondent comments:



- “Quarterly reviews, counseling sessions, and walkabout meetings.”
- “Regular scrutiny of the list of key resources, and associated development plans.”
- “Set up program to identify & develop these individuals.”
- “We have a Talent program in place to keep them and develop them.”

⇒ ***Most respondents indicated that a formal program was in place to review executive leadership skills, talent and performance***

Attracting New Talent

■ The following carrots are used to attract new talent

1. Company Reputation
2. Company Performance
3. Compensation
4. Great Career Advancement Opportunities
5. Stability of Management Team
6. Location
7. Other

One respondent: “These days, just having a job available is about all the carrot you need. That will last well into an economic or industry recovery.”

Board Leadership – Gaps and Desired Attributes

	Ranking of Perceived Gaps In Current Board Leadership	Ranking of Desired Attributes in Future Board Leadership
Deep Industry Relationships	1	2
Specific Functional Expertise	2	5
Industry Knowledge	3	1
International Experience	4	8
Diversity	5	9
Independence	6	3
Sitting CEO	7	11
Public Company Experience	8	6
Does Not Serve On Too Many Boards	9	7
Financial Literacy	10	4
Retired CEO	11	10
Other	12	12

⇒ ***Industry Relationships and Industry Knowledge are considered vitally important***

Board Leadership – Important Functional Expertise

	% Respondents Who Perceived Gaps In Current Board Functional Expertise	Respondent Ranking on Desired Functional Expertise In New Board Members
Strategy	29%	1
Marketing	49%	2
Sales	38%	3
Operations	42%	4
Finance	15%	5
Audit & Control	21%	6
Leading Edge Technology	59%	7
Human Resources	27%	8
Other	6%	9

- ⇒ *Lack of Sales and Marketing talent appears to be impacting both governance and operations (slide 8)*
- ⇒ *Expertise in “Leading Edge Technology” is a perceived gap, and at same time is not considered especially important for new board members*

Study Leaders



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John leads Spencer Stuart's North American Communications & Media Specialty Practice, and is a leading authority on the global telecom, datacom and high-tech markets. John also plays a key role in guiding Spencer Stuart's Global Intelligence® Practice and in executing many of its most critical projects.



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Don Render has made a study of the types of leaders who can turn strategic ideas into real world successes. He is a member of the Technology & Communications Practice and brings expert knowledge of all roles within telecommunications equipment companies and service providers.

[Spencer Stuart and TIA Collaborate on Study: How Communications Companies Survive the Downturn and Implications for Recovery](#)

SILICON VALLEY and ATLANTA – (BUSINESS WIRE) – June 2 Spencer Stuart, one of the leading global executive search consulting firms specializing in chief executive and board assignments, and the Telecommunications Industry Association (TIA), the leading U.S. trade association representing manufacturers and suppliers of global communications products and services, today released at SUPERCOMM 2003 the results of a [study](#) that focuses on what industry leaders are thinking about current challenges and how communications systems and services companies are preparing for a market upturn.

Seeking to provide value-added information regarding how issues of the day are affecting long-term planning, particularly when it comes to talent, company leadership and good governance, the paper includes comments and insights from various industry thought leaders.

"In talking with the team at TIA, we quickly determined that strategic human capital planning and related board governance issues at communications companies are of great interest to the industry at large," said John Keller, managing director of Spencer Stuart's Communications Practice. "We have worked closely with TIA to identify and highlight the major challenges that communications companies are facing."

"The quality of a company's management team may be one of the most important elements of building a successful plan to prepare for the market's rebound," said Matthew J. Flanigan, president of TIA. "By working with Spencer Stuart to analyze and share our findings with the communications industry, we will give industry executives the kind of valuable information they need to best prepare their management and leadership plans for 2004 and beyond."

Key findings of the study include:

- Even though spending in these areas has been drastically cut, new product/service development and the growth of key partnerships and alliances are considered the most important factors affecting company strategy and operating plans.
- Cost reduction is central to current business decisions. Financial constraints and the obsession with stabilizing the business are impeding growth and planning for the future.

- Downsizing has left huge functional gaps in customer-facing functions, particularly sales and marketing, as well as R&D.
- Leaders are concerned with retaining their best talent. However, only 66 percent of respondents said their companies are working on a comprehensive human capital plan.
- With regard to corporate governance, companies want board members who are savvy about sales and marketing, have specific industry knowledge and who also will fulfill the new requirements for independence.

In summary, companies are struggling to balance cost reductions with a need to review constantly the balance between product and service development and the selling and marketing of those products and services. The communications industry, challenged to retain its best and brightest people lest they move to other industries such as life sciences and technology, must review carefully current and future functional gaps. Establishing the vision and supporting the leaders who can reach business goals requires a talent and human capital plan focusing on attraction, development and retention.

About Spencer Stuart

Spencer Stuart is the foremost privately held, global executive search firm, spanning over 50 offices in 25 countries. Since 1956, we have been providing select clients with a range of human capital solutions, including senior-level executive search, board director appointments, strategic leadership services and middle-management recruiting. We conduct nearly 4,000 assignments each year, partnering effectively with clients ranging from the Fortune 5000, to mid-cap, to emerging growth companies across a broad range of industries and sectors. Widely regarded as the firm of choice for CEO, board director and other top-level executive searches, our worldwide consultants have the judgment, insight and expertise to find the ideal fit for each company's unique circumstances and business goals.

About the Telecommunications Industry Association

The Telecommunications Industry Association (TIA) is the leading U.S. non-profit trade association serving the communications and information technology industry, with proven strengths in market development, trade shows, domestic and international advocacy, standards development and enabling e-business. Through its worldwide activities, the association facilitates business development opportunities and a competitive market environment. TIA provides a market-focused forum for its 1,000 member companies, which manufacture or supply the products and services used in global communications.

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Blue Paper

Will you be ready?

How the communications industry is surviving while planning for a robust future

SpencerStuart



Spencer Stuart

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We are committed to adhering to the same firm policies, procedures and professional standards worldwide in order to provide a service of the highest caliber to our clients.

As the communications industry entered a new century in 2000, those who managed the most reliable infrastructure on earth saw a limitless future enhanced by technological innovation and aggressive competition. Then disaster struck — the communications industry, already impacted by a global economic downturn, significant technological change and demanding customers, was scalded by scandal. A few business leaders callously disregarded good governance and proper financial controls. Shareholders and employees suffered, investors fled, new capital investment dried up and hundreds of businesses failed. Now many wonder whether the industry will ever bounce back.

It will. And perhaps sooner than anyone envisions. The question is, will industry leadership be prepared for the upturn from a talent standpoint?

Spencer Stuart, in cooperation with the Telecommunications Industry Association (TIA), recently set out to learn what business leaders are feeling about the industry's myriad challenges and understand how these are affecting long-term planning, particularly when it comes to talent, company leadership and good governance.

Staying smart about talent and being ever mindful of the best managers who get results is central to any successful business plan. How are industry leaders approaching human capital strategies as they manage through a litany of economic and market challenges? Are they drawing on rich market intelligence to attract the best managers to their companies? Are they constantly refining their game plans to meet new challenges in this unforgiving climate? What do they see in the future? What steps are they taking to motivate senior managers who lack the passion to make their businesses winners?

Senior managers must prepare for the inevitable upturn. Yet our survey of more than 2,100 industry executives in North America — which elicited a heavy response from CEOs, human resources executives and business-unit leaders across the communications sector — indicates an industry in triage.

“The industry has stopped the bleeding and the patient is stable. While we are out of intensive care, we are still hooked up to machines and people are monitoring us 24 hours a day.”

**MIKE KENNEDY, CORPORATE VICE PRESIDENT AND DIRECTOR OF GLOBAL GOVERNMENT
RELATIONS FOR MOTOROLA; AND CHAIRMAN OF THE BOARD OF DIRECTORS OF TIA**

Indeed, with business survival on the line, CEOs and their direct reports have been forced to dream less. Managers have hunkered down, focusing on stabilizing their revenue streams — with little hope for meaningful growth — and retaining customers. The skills most in vogue today — hands-on operations and cost-cutting — are reflective of this preoccupation with surviving the downturn. Price competition, especially in the consumer market, impedes revenue growth. Businesses also are collapsing management layers to improve efficiency, trimming headcounts and scaling back capital spending because of overcapacity. Aggressive financing, deal-making, R&D and project building have become much less attractive.

Key study findings

- > Even though spending in these areas has been drastically cut, new product/service development and the growth of key partnerships and alliances are considered the most important factors affecting company strategy and operating plans.
- > Cost reduction is central to current business decisions. Financial constraints and the fixation with stabilizing the business are impeding growth and planning for the future.

- > Downsizing has left huge functional gaps in customer-facing functions, particularly sales and marketing, as well as R&D.
- > The development of leading edge-technology also is being sacrificed.
- > While companies now are beginning to rebuild or enhance their sales and marketing — critical for future growth — research and development is being de-emphasized because of a paucity of funding and specialists to carry out the work.
- > A majority of communications leaders are paying less attention to succession planning, though some said their companies still track high performers on a regular basis, with an eye towards moving them up the management food chain.
- > Leaders are concerned with retaining their best talent. However, only 66 percent of respondents said their companies are working on a comprehensive human capital plan.
- > With regard to corporate governance, companies want board members who are savvy about sales and marketing, have specific industry knowledge and who also will fulfill the new requirements for independence.

Strategic implications

The industry's meltdown has prompted a major restructuring of organizations' spending and innovation. At the same time, managers are struggling not to lose sight of the potentially disruptive technologies that will advance their business ambitions. The industry has grown particularly complex as telecommunications, data communications and computing converge. The new environment requires that this focus be maintained even in the face of diminished funding.

“What we need is more of a software industry approach, where the cost of innovation is very low. But within the communications services environment, this can't be done today. It's not a marketing problem, but more a cost-of-innovation problem. It's the fundamental restructuring of how innovation must be effectively packaged to be a value-added solution offering.”

HOWARD BUBB, VICE PRESIDENT AND GENERAL MANAGER OF INTEL

“To prevent disruptive technologies from slipping through their fingers, established organizations must learn how to identify and nurture innovations on more modest scales — so that...overhead is low enough to permit early profits,” according to Joseph L. Bower and Clayton M. Christensen, co-authors of “Disruptive Technologies: Catching the Wave.”

This *Harvard Business Review* article states that one of the most consistent patterns in business is the failure of leading companies to stay at the top of their industries when technologies or markets change. Bower, professor of business administration at the Harvard Business School, is a leading expert in the fields of corporate strategy, organization and public policy. Christensen is professor of business administration at the Harvard Business School. His research and writing centers on the management of technological innovation, developing organizational capabilities and finding new markets for new technologies. Both men have written extensively about the development of strategy and organization, restructuring and the impact that rapidly changing technological innovation has on top management and the world economy.

Today, communications companies are largely focused on servicing and retaining current customers to remain viable. Industry leaders in our survey cited new product and service development as the most important factors affecting these efforts. In addition, these executives noted they must attract new customers, forge key partnerships and alliances and enhance overall quality to improve the customer experience.

But they must do so with constrained budgets. The majority of study participants, 55 percent, cited cost reduction as the limiting factor in current business decisions. One president of a telecom equipment supplier noted that his business is constrained by large carrier customers that are struggling to improve their own balance sheets, while his smaller service-provider clients are obsessed with conserving cash. Still others are restricting new investments altogether, preferring to harvest the capital they already have invested. All of this underscores how a paltry availability of capital is impeding a turnaround among telecom carriers and their technology suppliers.

Major roadblocks to an industry recovery include:

- > funding constraints limiting innovation, customer care and quality improvements;
- > a brain drain in R&D;
- > near-sighted planning, which discourages blue-sky strategy that may provide breakthrough growth differentiators in the future;
- > frequent upheaval in the executive suite and boardroom; and
- > lack of “upturn planning.”

Some executives surveyed said a recovery would not begin to occur for another 12 to 18 months. As a result, “upturn planning,” which would enable business leaders to spot and lure top talent to their companies in preparation for the turnaround, is on the back-burner. Layoffs have forced many talented managers onto the street, and many of those surveyed said they cut costs further by outsourcing many of their critical operational needs. R&D talent, who also could create leading-edge technology and service innovations, have been let go. Some wonder if, as a result, the industry is mortgaging its future. “We have done so much damage to our talent pools,” said Matt Flanigan, president of TIA. “The next generation of R&D has been severely hurt. So much of our talent has been outsourced outside of the country.”

The talent for today...and tomorrow

Downsizing has taken its toll on many companies’ management teams and staff, making recovery difficult. Respondents believed that the biggest functional gaps resulting from the downsizing are in customer-facing functions, notably sales and marketing. According to one respondent, “There is a definite lack of excellent, aggressive and effective sales people. There are a lot of people interested in the selling position, but the results are not forthcoming.”

“Today there are skill gaps resulting from all the downsizing, particularly in R&D, financial management and marketing. Clearly muscle has been cut and these gaps will need to be filled when the rebound occurs.”

DAN SCHARRE, CEO OF LARSCOM, A MANUFACTURER OF WAN NETWORK ACCESS EQUIPMENT

Approximately 60 percent of respondents said the type of talent needed will be much different than in the past. “We are analyzing the core competencies required during the rebound,” said Jim Morrison, vice president of talent resources for Alcatel USA. “We envision transforming the company from an engineering organization to one that is more market focused.”

Rob Pullen, vice president of North American sales and marketing for Tellabs, a company that builds communications and bandwidth management infrastructure, commented, “In the current environment, we need sales people who are skilled at discovery, possess consultative selling skills, are able to quantify benefits objectively and sell products and services.”

A major victim of the current downturn is R&D. Respondents said they are being forced to de-emphasize research and the development of new products and services. As a result, companies are losing such talent. Many of those who specialize in R&D related to communications are leaving the industry because of a lack of funding, which has prohibited them from turning their ideas into innovations. As a result, companies in North America are losing their technical edge, and much of the innovations are, for the first time, coming from Japan, China and India. If the trend continues, it is quite possible that future innovation will emanate increasingly from outside the U.S.

How companies are attracting and retaining the best talent

While major skill gaps have resulted from the downturn due to cutbacks in spending, some companies are working hard to retain strategic talent. Most said they are using some type of incentive program to retain key team members, yet only 66 percent are working on a comprehensive human capital plan to retain their experts when the industry pivots toward an upturn.

How are they doing it?

Factors important to retention of key members of the team (ranked by “most common” to “least common”):

1. Financial stability of organization
2. Company vision/strategy
3. Reputation of management team
4. Ability to differentiate message versus competitors' for future growth
5. Overall outlook for the communications industry
6. Culture of the organization
7. Competitive compensation plans
8. Strength of brand equity
9. Stature of members of board of directors
10. Training and professional development
11. Clearly delineated career path
12. Cost of living locally
13. Quality of life

Factors that attract new talent (ranked by “most common” to “least common”):

1. Company reputation
2. Company performance
3. Compensation
4. Career advancement opportunities
5. Stability of management team
6. Location

In the current environment, decision-making has shifted from the lower levels within the organization back to senior management. This has occurred mostly for cost containment purposes. As a result, lower-level managers previously responsible for purchasing decisions feel disempowered. “Many skilled people left the industry because of reduced responsibility and lack of investment and invention,” Pullen said.

Dr. Ken Rose, president and CEO of Henkels & McCoy, a large, privately held engineering, network development and construction firm serving the communications, information technology and utility industries, said, “Our success depends upon effective field supervision of crews comprised of productive workers and great equipment. With the decline in outside plant business, we are converting our best performers from telco to other infrastructure construction. Hiring new people might be easier, but we’re making a concerted effort to retain good talent within the company. This requires an investment in cross-training to adapt basic skills to new environments, but will leave us well prepared to resume telco work when the industry recovers.”

Communications leaders surveyed, however, said they are making major changes to compensation and benefits plans. These changes seem to further discourage the long-term attraction and retention of critical talent that should be in place to plan and execute for an upturn in business. Among the changes cited:

Salary freeze	70%
Elimination of bonuses	48%
Bonus cap	32%
Stock options in lieu of cash	29%
Re-pricing of stock options	28%
Salary reduction	27%
Creation of long-term incentive plans	25%
Other	14%
Phantom stocks	4%

The boardroom

Most respondents said a “values meltdown” among leadership and a lack of oversight by directors were exceptions and not the rule among communications companies. As such, audit and control concerns are not major factors impacting current operational planning. Still, most boards are re-examining their corporate governance practices — stemming from shareholder outrage and new government regulations calling for greater independence. Many added that their companies are pursuing directors with deep industry relationships and knowledge of a specific industry or segment. Also targeted are those with expertise in leading-edge technology and marketing knowledge, as well as strategy and sales experience.

BOARD LEADERSHIP: GAPS AND DESIRED ATTRIBUTES

	Ranking of Perceived Gaps in Current Board Leadership	Ranking of Desired Attributes in Future Board Leadership
Deep industry relationships	1	2
Specific functional expertise	2	5
Industry knowledge	3	1
International experience	4	8
Diversity	5	9
Independence	6	3
Sitting CEO	7	11
Public company experience	8	6
Does not serve on too many boards	9	7
Financial literacy	10	4
Retired CEO	11	10
Other	12	12

Asked about the attributes that were most desirable in a board director, one CEO said, “Overall business acumen [and knowledge about] what the company is doing....what questions to ask and [knowing] what is really happening [inside the company]. Only then can a board member offer seriously credible direction and integrity to the company.”

Planning for the future, before it's too late

Approximately 42 percent of human resources and business-unit leaders surveyed questioned the adequacy of their companies' current succession plans. A mere nine percent said there was a "very satisfactory" plan in place. Surprisingly, the majority of respondents didn't see succession planning as a priority, primarily because their current focus is meeting the challenges of today.

A few companies, however, are addressing succession planning. "The officers [at Tellabs] have recently conducted a more formalized succession planning process. The industry is turbulent and people may decide to leave or their relationships with their companies may be severed — as a result, more formal succession planning is required," said Pullen.

This problem is exacerbated by downsizing. Many key people, rooted deeply in the organization, have either been let go or have chosen to leave. That means long-standing ties to companies are being severed and obvious candidates for succession to key jobs are leaving. That heightens the need for aggressive succession planning.

Though consistent, effective succession planning is being sacrificed to downsizing and the failure of some new businesses to gain traction, the majority of respondents did report that their companies have formal programs that track high-potential executives. "We have a process for leadership supply," said Mike Kennedy, corporate vice president and director of global government relations for Motorola; and chairman of the board of directors of TIA. "We believe that people are our best asset — and more time and attention is focused on this now more than ever."

Mike Donovan, chief operating officer of Marconi, added, "We have a tracking system for high-potential performers. We address the top five layers in the organization. Twice a year, we complete organizational competency reviews for these layers, which include behavior and performance expectations. We identify the individuals who we think have immediate potential and then we try to position them so they realize that potential."

Both leaders agreed with various survey respondents that those who ignore succession planning will seriously hurt their company's ability to develop talent and capitalize on the upswing when it occurs.

Conclusion

The challenges of operating in this economic environment are incredibly difficult. Managers are busy triaging to cope with the downturn, further delaying recovery and their abilities to capitalize on it.

Companies must review carefully their current and future functional gaps. As executive management focuses on finding experienced sales and marketing professionals who will help companies better anticipate a market rebound and sales opportunities, they will likely need an uptick in R&D to enhance their arsenal of offerings. Companies are struggling to balance cost reductions with a need to review constantly the balance between product and service development and the selling and marketing of those products and services. Organizations that remain overly focused on restraining investment and harvesting their existing business will be ill-prepared for an upturn, by which time it may be too late to capitalize fully on the influx of new business.

“Communications, and telecommunications for that matter, are important to everyone. All businesses and all consumers use them — now more than ever. Because it is so important, you can draw the conclusion that the industry is going to come back. The comments and stories told here help us understand what needs to be done as the industry prepares for the turnaround.”

MATT FLANIGAN, PRESIDENT OF TIA

The communications industry also is challenged to retain its best and brightest people, lest they move to other industries such as life sciences and technology. More in-depth planning is needed to ensure that short- and long-term incentive programs aimed at retention are in place. In addition, the industry may need to look at outside hiring to augment its internal executive development, placing greater focus on individual functional expertise versus pure industry experience. They also will need executives and board directors who can continue to promote the spirit of entrepreneurial activity rather than create an organization limited in its aspirations by a short-term focus centering on cost containment.

Finally, communications companies must heighten their awareness of and focus on succession planning. One major cause of the industry’s talent deficiency is a lack of planning and long-term vision, necessitated by the current downturn. Establishing the vision and supporting the leaders who can reach those goals requires a talent and human capital plan focusing on attraction, development and retention. Those companies that stay focused on all of the above will lead the communications industry into a certain recovery.

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John is a leading authority on the global telecommunications, datacom and high tech markets and leads Spencer Stuart's Communications Specialty Practice in North America. His unique perspective has helped him recruit star performers for high-profile clients in the rapidly expanding telecommunications, technology, Internet and media industries. Prior to joining Spencer Stuart, John was a news editor at *The Wall Street Journal* for nine years, where he led the publication's coverage of telecommunications and technology as a reporter and editor. Prior to the *Journal*, he was the telecommunications industry editor at *BusinessWeek* and was a founding editor of *CommunicationsWeek*, since renamed *InternetWeek*. John is a graduate of Baruch College in New York.



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Tom is a core member of the firm's Communications Specialty Practice and concentrates in wireless data and services and software. He has completed many senior-level executive searches for a variety of communications, software and media companies. Prior to joining Spencer Stuart, Tom was the assistant corporate secretary to the board of directors for Prudential Insurance Company of America. Tom is a graduate of Georgetown University with an A.B. in English. He earned an M.B.A. from Columbia University's Graduate School of Business.



About our study

Spencer Stuart, in cooperation with TIA, recently completed an important industry study focusing on leadership and corporate governance. After identifying leading North American communication services and systems companies, we reached out to more than 2,100 industry executives — including CEOs, human resources executives and business-unit leaders — and achieved a 10 percent response rate. Our research focused on four major areas — strategy and operational plans, CEO and senior management succession, executive attraction/retention, and corporate governance issues.

RESPONDENT PROFILE

Sector	% Respondents	Company Annual Revenue	% Respondents
Wireless	41%	\$0 - \$5 million	24%
Communication systems	38%	\$5 million - \$50 million	20%
Communication services	35%	\$50 million - \$250 million	22%
Wireline	33%	\$250 million - \$1 billion	9%
Communication software	26%	> \$1 billion	25%

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Spencer Stuart is the foremost privately held, global executive search firm, spanning over 50 offices in 25 countries. Since 1956, we have been providing select clients with a range of human capital solutions, including senior-level executive search, board director appointments, strategic leadership services and middle-management recruiting. We conduct nearly 4,000 assignments each year, partnering effectively with clients ranging from the Fortune 500, to mid-cap, to emerging growth companies across a broad range of industries and sectors.

Telecommunications Industry Association

The Telecommunications Industry Association (TIA) is the leading U.S. non-profit trade association serving the communications and information technology industry, with proven strengths in market development, trade shows, domestic and international advocacy, standards development and enabling e-business. Through its worldwide activities, the association facilitates business development opportunities and a competitive market environment. TIA provides a market-focused forum for its 1,000 member companies, which manufacture or supply the products and services used in global communications.

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Terry Price Panel Participation “Will You Be Ready?” Survey/Study Talking Points

CEO/GM and Business Unit/HR Leader

1. CEOs believe the most important factors affecting these companies' strategy and operating plan are (1) New Product & Service Development and (2) Key Partnerships/Alliances. Audit & Control issues do not appear to be a major influencing factor. (slide 4)
2. The top areas in Which Steps Have Been Taken to manage current market challenges are (1) Cost Reduction, (2) Improved product Quality (3) New product service & Development. While audit and control issues may have been addressed, it ranked low on the list (slide 5)
3. The biggest roadblocks are considered (1) Financial Constraints to Funding & Cost Control Issues, and that (2) Companies are simply Concentrating on Current Critical Issues. Sixth in ranking was “No Strategy in Place to Prepare for the Upswing of the Communications Sector” QUESTION: Does this mean companies have a strategy in place to prepare for the upswing - or has this not yet been fully addressed? (slide 6)
4. 41.5% of the BU/HR leaders question the adequacy of their company's current succession plan (ranking 1 or 2) Question: Can companies effectively compete for the upswing if no effective succession planning is in place? (slide 7)
5. CEOs think that 2 of the 3 biggest functional gaps are in customer-facing functions – i.e., sales and marketing, with gap in leading edge technology coming in second place (slide 8)
6. There is a strong de-emphasis on R&D. Implication: companies are focusing more on the plan and process to quickly move their product/service into market (slide 9)
7. Various carrots are used to retain key members of the team*.....yet only 66% have worked on a comprehensive human capital plan. Question: Would having this plan in place help provide competitive advantage when the market upturns? (slide 10)

Board Leadership

1. Industry Relationships and Industry Knowledge are considered vitally important by CEO/GMs and BU/HR Leaders (slide 12)
2. The major gaps in board Functional Expertise are in Leading Edge Technology and Marketing. When it comes to attracting new board members, they're primarily looking for Strategy and Marketing expertise. The lack of Marketing talent appears to be impacting both governance and operations (slide 13 and 8)