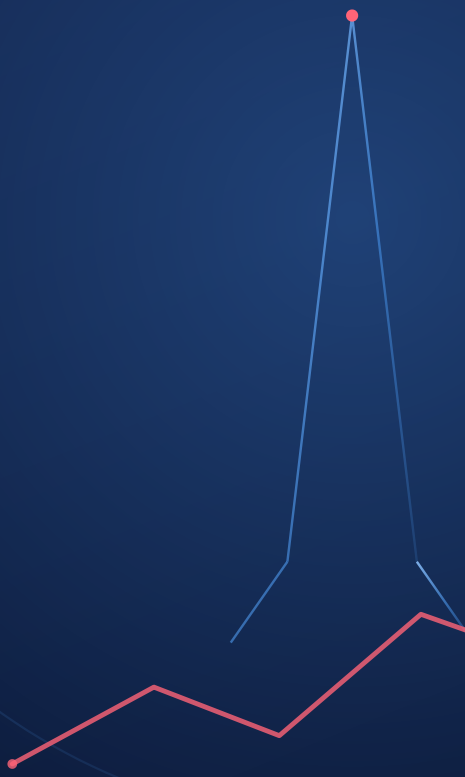
PITON Global

EXECUTIVE WHITE PAPER

TELECOM & CONNECTIVITY · PHILIPPINES

Signal and noise: the executive economics of telecom outsourcing to the Philippines.

An analysis of subscriber economics, connectivity support, save-desk retention, truck-roll avoidance, and vendor-selection discipline for ISPs, MVNOs, and connectivity providers sourcing in the Philippines.



AUTHORS

John Maczynski — Chief Executive Officer
Ralf Ellspermann — Chief Strategy Officer

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TELECOM OUTSOURCING

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ABOUT THIS SERIES

Telecom is where Philippine outsourcing learned its trade — the vertical that built the industry's first great delivery floors. It is fitting, thirteen volumes in, that this series returns to it with the same instruments applied everywhere else: verified costs, audited benchmarks, an honest census of the qualified field, and the governance record of what separates programs that perform from programs that merely bill.

THE PITON-GLOBAL LEADERSHIP TEAM

About the authors

John Maczynski

Chief Executive Officer

Subscriber businesses were John's proving ground: much of his thirty-plus years running outsourced operations for major US corporations was spent where monthly bills meet monthly moods — card programs, service subscriptions, and the queues that keep them. That is the experience buyers rent when he leads their engagement, as he does every PITON-Global mandate: personally, from requirements definition through the launch that vindicates the choice.

j.maczynski@piton-global.com
+1 402-598-8740

Ralf Ellspermann

Chief Strategy Officer

Telecom floors were among the first Ralf walked when he arrived in Manila over two decades ago, and the vertical has threaded through his delivery career since — connectivity support, subscriber care, and the retention desks where a carrier's quarter is quietly decided. He knows which of the country's providers still carry that inheritance at benchmark strength, and the firm's provider intelligence, refreshed under his direction, is how clients get that knowledge without his mileage.

r.ellspermann@piton-global.com
Manila, Philippines

PITON Global

ABOUT PITON-GLOBAL

Since 2001, from Manila, PITON-Global has practiced a single discipline with award-winning consistency: representing outsourcing buyers in a market where every seller claims everything. The firm's edge is accumulated evidence — a living, engagement-tested map of more than a thousand Philippine providers — deployed for clients as precise requirements, ruthlessly gated shortlists, competitive RFPs, and embedded advisory through launch. It takes nothing from providers and owes nothing to them. Tripadvisor, TSYS, Garmin, HealthPartners, Yetipay, Workrise, and Norman Disney & Young have all sourced their Philippine operations through the firm.

SECTION 01

Executive summary

-63%	38%	32%	5.8×
Blended fully-loaded cost vs. US onshore	Save rate on cancel-intent contacts (vs. ~24%)	Truck rolls avoided through remote resolution	First-year ROI, reconstructed ISP case (Section 6)

Connectivity is the rare product customers pay for monthly and think about only when it fails — which makes its service economics brutally simple: every contact is either a cost contained, a subscriber saved, or a truck dispatched. ARPU is flat across the industry; network capex is not negotiable; the service operation is where a connectivity P&L still has room to move. For regional ISPs, fiber overbuilders, and MVNOs — the buyers without hyperscale captives of their own — that room is decisive.

The Philippines built its outsourcing industry on exactly this work: the telco programs of the 2000s trained the country's first generation of team leaders, and connectivity support remains the deepest bench in the market. What has changed is the buyer's problem — no longer whether the work can move, but which providers still run telco-grade machinery (save desks, remote-resolution discipline, outage surge protocols) rather than trading on a twenty-year-old reputation. Five findings frame the volume:

1. **Every queue defends ARPU or attacks cost — know which.** Care and billing contain cost; the save desk defends revenue; tech support does both, one remote fix at a time. Pricing all three at one blended rate is how buyers lose the plot; Section 4 prices them separately.

2. **The save desk is the highest-yield seat in the building.** A tenured save specialist at $12.00 an hour defending a $65 ARPU subscriber is the best trade in subscription economics — when the desk runs offer matrices, reason capture, and QA discipline rather than desperation discounts.

3. **The cheapest truck is the one that never rolls.** A third of residential dispatches are avoidable with disciplined remote diagnostics — modem provisioning, signal checks, guided resets — at $85–150 saved per roll and a happier subscriber besides.

4. **Outages are the trading events of connectivity.** When a node fails, contact volume goes vertical on no notice. The surge machinery this series documented for retail promos and travel disruptions applies verbatim — proactive notification, IVR deflection, surge waves — and is contractible.

5 **Telco heritage ≠ telco capability.** Hundreds of Philippine providers cite carrier logos from 2008; PITON-Global's mapping confirms current connectivity practices — live ISP programs, save-desk evidence, outage references — at roughly thirty-five. The census, as always, is the sourcing problem.

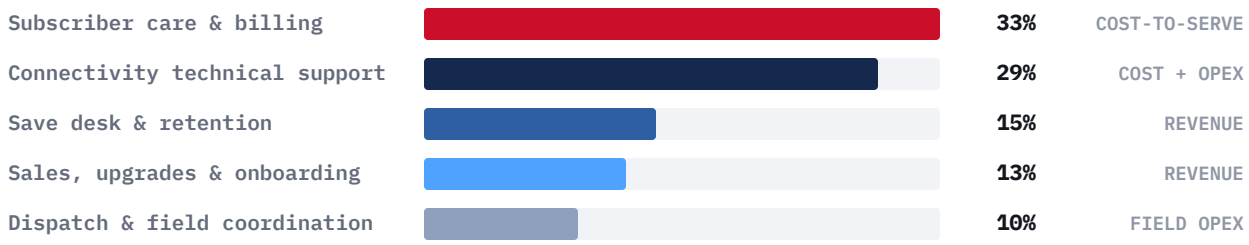
The intended reader runs operations, customer experience, or finance at a regional ISP, fiber overbuilder, cable operator, MVNO, or connectivity-adjacent platform. Sections 2–4 supply the evidence; sections 5–7, the method and the proof.

SECTION 02

ARPU against the queue: subscriber economics and the work that moves

Figure 1 maps the outsourced telecom work mix — each family tagged to the subscriber-economics lever it moves. The discipline of reading the queue this way is the volume's central habit: it converts a cost-center org chart into a set of investable propositions.

FIG. 1 — OUTSOURCED TELECOM WORK MIX, TAGGED TO THE LEVER IT MOVES (ENGAGEMENT BASE 2024–26)



Source: PITON-Global telecom engagement base, 2024–26 — regional ISPs, fiber overbuilders, cable operators, and MVNOs.

Two structural notes. First, **billing is where trust is won or lost**: disputed charges drive more churn intent than outages in most residential books, and a desk that resolves billing disputes at 82% first contact — with credit authority defined in the SOW, not improvised — removes the top reason subscribers start shopping. Second, **technical support carries double duty**: every remote resolution is both a satisfied subscriber and an $85–150 truck roll avoided, which is why the Technical Support paper's tier-stack disciplines appear here with a field-operations multiplier attached.

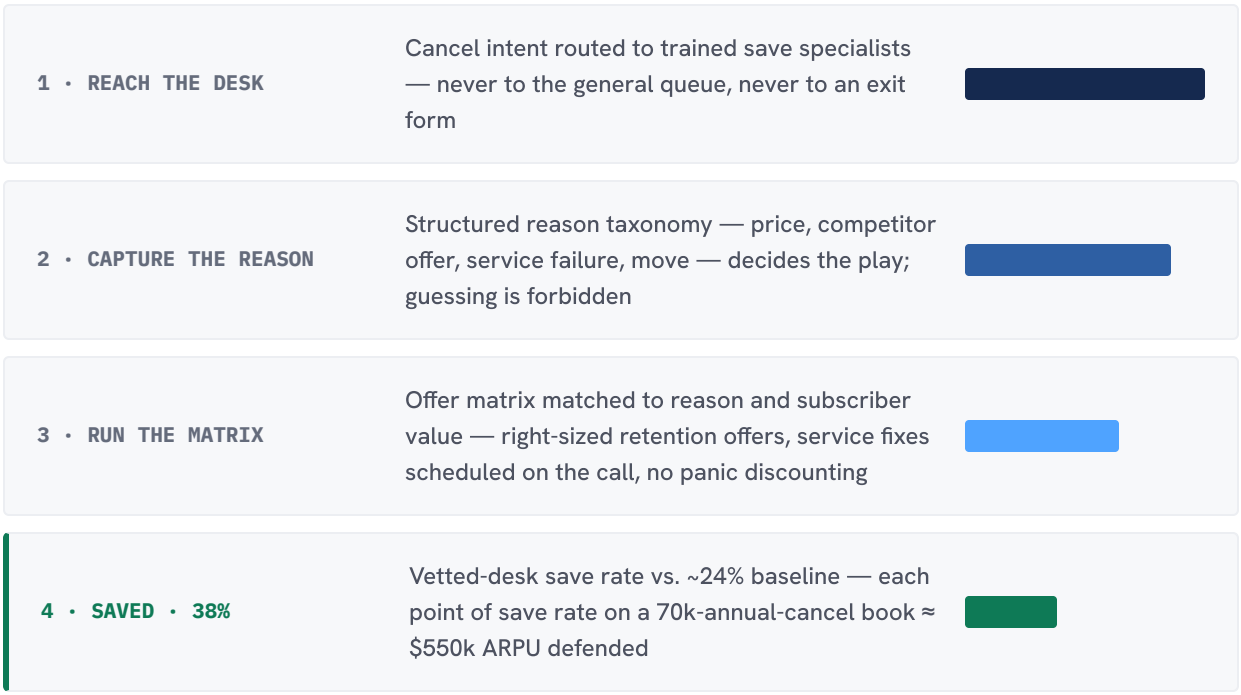
The AI reset reads familiarly: outage bots and self-serve diagnostics absorb the simple contacts, leaving agents the judgment work — the intermittent-connection mystery, the bill that needs a human explanation, the cancellation that is really a negotiation. The residual queue is more valuable per contact, and the premium on provider quality rises with it. Thirteen volumes of this series have not found an exception to that pattern.

SECTION 03

The save desk: retention as an operating discipline

Most operators treat cancellation calls as paperwork with a pulse. A disciplined save desk treats them as the highest-stakes sales conversations in the company — because they are. Figure 2 traces the funnel a vetted desk runs, with the conversion at each stage.

FIG. 2 — THE SAVE FUNNEL: FROM CANCEL INTENT TO KEPT SUBSCRIBER



Save-funnel mechanics and rates from PITON-Global telecom engagements, 2024–26; ARPU-defended figure at $65 blended ARPU, 12-month horizon.

Three disciplines separate a save desk from a discount dispenser. **Offer governance:** the matrix is finance-approved, value-tiered, and audited — a saved subscriber on a panic discount is often a loss wearing a win's jersey. **Reason analytics as a deliverable:** the desk's taxonomy feeds pricing, network, and product weekly; when "competitor fiber at my address" spikes in a zip code, the market team knows before the quarter ends. **Tenure:** save conversations are learned, and the desks that hold 38% keep their specialists past the two-year mark — the same tenure economics every volume of this series has priced.

The desk's twin is proactive retention — contract-expiry outreach, usage-anomaly saves, win-back campaigns on 90-day-old cancels — run from the same floor at the same rates. In PITON-Global's engagement data the proactive book returns two to three saved subscribers for every reactive one, at lower offer cost, for the obvious reason: the conversation happens before the competitor's installer is scheduled.

SECTION 04

Cost and performance: role-band economics and top-tier benchmarks

TABLE 1 — FULLY-LOADED COST PER PRODUCTIVE HOUR BY ROLE BAND (US$, 2026)

Basis: PITON-Global telecom engagement pricing 2025–26; fully loaded and net of shrinkage, as defined in Methodology & notes. 24/7 coverage and outage-surge seats at flat rates.

TABLE 2 — TELECOM OPERATING BENCHMARKS, VETTED VS. BASELINE (2025–26)

METRIC	VETTED TOP TIER	BASELINE	EXECUTIVE READING
First-contact resolution (care + tech)	**76%**	~60%	Repeat volume retired
Save rate on cancel intent	**38%**	~24%	ARPU defended at the desk
Truck rolls avoided (remote resolution)	**32%**	~12%	$85–150 per roll, kept
Billing disputes resolved first contact	**82%**	~64%	The churn driver, defused
Outage-event SLA retention	**–5 pts**	–25 to –40 pts	The vertical's stress test
Annual attrition, telecom programs	**24–32%**	45–60%	Network knowledge stays in seat

Source: PITON-Global telecom engagement data 2025–26; baseline = client pre-engagement and onshore/commodity-offshore averages.

Behind the column, the series' standard machinery — calibrated QA at double density, certification gates, tenure economics — plus two telecom-specific engines: **network-aware routing** (the desk sees outage maps and node status live, so an agent never diagnoses a known event one subscriber at a time) and **the outage playbook** — proactive notification the moment a node drops, IVR and SMS deflection carrying the known-event load, surge waves activating on hour-zero clocks. Both are diligence items; both separate the providers with current telco machinery from those with vintage telco logos.

SECTION 05

Sourcing discipline: the 7-Step Vendor Vetting Framework, applied to telecom

Telecom's discriminating diligence artifacts are two: the save-desk export (rates, offers, reasons — by month, from a live program) and the outage story a reference will actually confirm. The funnel below is representative of a regional-ISP search.

FIG. 3 — THE 7-STEP FRAMEWORK AS A TELECOM FUNNEL

	STEP	WHAT IT ELIMINATES IN A TELECOM SEARCH	FIELD REMAINING
1	**Requirements definition**	Blended-queue thinking: fixes volumes by queue and lever, credit and offer authority, systems (OSS/BSS, CRM, dispatch), outage surge multiples, quality targets	1,000+
2	**Market mapping**	Providers without 24/7 delivery or the scale band a subscriber book requires	~110
3	**Capability screening**	Vintage-logo shops: current connectivity programs, live save desks, remote-resolution tooling — evidenced with exports, not case-study PDFs	~35
4	**Compliance & security audit**	Weak subscriber-data and payment controls: SOC 2 on the unit, PCI where payments touch, CPNI-aware handling, BCP proven under an actual event	~18
5	**Operational diligence**	Save rates that fail export sampling; outage stories references won't confirm; attrition that churns network knowledge yearly	6–10
6	**Competitive RFP & negotiation**	One-rate quotes across three different queues; finalists bid by queue with lever-matched credits — FCR and roll-avoidance, save rate, dispute resolution	2–3
7	**Transition & launch governance**	Launching before the first outage: PITON-Global stays embedded buyer-side through the first live network event, then hands over	1

Field-remaining counts represent a regional-ISP search (40–120 seats), PITON-Global engagements 2024–26.

The guarantees hold as ever. **Vendor neutrality:** no capacity sold, no placement economics — the save-desk export outweighs the steak dinner. **Right-sizing:** a regional ISP inside a provider built for hyperscale carriers inherits hyperscale indifference; the framework surfaces connectivity specialists for whom a 70-seat book is a flagship account with the CEO's cell number attached. Six to ten best-qualified providers, within 48–72 hours, free to the buyer, competing through a fully transparent, fair, comprehensive, and highly competitive RFP.

SECTION 06 · ANONYMIZED CASE STUDY

Saving the book: a 70-seat regional-ISP program, reconstructed

The case engagement is a US regional fiber ISP — roughly 800,000 subscribers across three states — squeezed from both ends: a national overbuilder entering its best markets, and a service operation whose costs rose as its metrics fell. Cancel-intent calls were handled by whoever answered; a third of truck rolls closed with no fault found; and the operator's own churn post-mortems cited "billing confusion" more often than network quality. Identifying details are anonymized under NDA.

SELECTION (WEEKS 0–8)

Requirements fixed a 70-seat, 24/7 scope — 30 care and billing, 24 connectivity tech support, 10 save desk, 6 dispatch coordination — on the ISP's OSS/BSS stack, with credit and offer authority defined to the dollar and outage surge multiples in the RFP. Mapping yielded 104 claimants; current-program screening cut the field to 31; the audit left 16. Save-desk exports and outage references produced a shortlist of 7. A Manila connectivity specialist won at $11.60 per productive hour, with queue-specific credits.

TRANSITION (WEEKS 9–26)

Care and tech queues certified in first, with network-aware routing wired so the desk saw node status live. The save desk launched in week 14 behind a finance-approved offer matrix and a two-week shadow period; the reason taxonomy shipped to pricing and network teams from its first Friday. A December ice-storm outage — 40,000 subscribers dark for 30 hours — ran on the surge playbook at −6 points of service level. PITON-Global chaired buyer-side governance through the event and handed over on documented criteria in month 7.

TABLE 3 — CASE FIRST-YEAR VALUE BUILD-UP (US$)

VALUE COMPONENT	YEAR 1	BASIS
Labor & overhead arbitrage	$2.57M	131k productive hrs × ($31.20 − $11.60)
Churn defense (save rate 23%→37%, proactive book added)	$0.52M	Incremental saves × ARPU margin, 12-month horizon, offer costs netted
Truck-roll avoidance (remote resolution 13%→31%)	$0.38M	~3,400 avoided dispatches × blended roll cost
Billing-dispute rework & credit leakage reduced	$0.19M	Repeat-contact volume retired + goodwill credits brought under matrix governance
Gross value created	**$3.66M**	
Less: engagement & transition costs	($0.63M)	Transition, routing integration, offer-matrix build, shadow periods, governance overlay; advisory fee $0 (provider-paid model)
Net value ÷ cost = first-year ROI	**5.8×**	$3.66M ÷ $0.63M

Figures rounded; churn, roll, and rework effects conservatively factored. Method in Methodology & notes.

Seventy percent arbitrage, thirty percent operational value — the series ratio holds a thirteenth time, and the operational lines again trace to selection: the churn defense to save-desk exports demanded in Step 5, the roll avoidance to remote-resolution tooling screened in Step 3, the outage performance to a playbook proven before it was needed. The operator's CFO put it in the language of the industry: "We stopped paying retail for our own inefficiency."

SECTION 07

The executive playbook: governance for the first 180 days

Telecom governance runs on three clocks — the queue's, the network's, and the churn cohort's. The sequence below keeps all three, with the client in command throughout.

DAYS 0–30

Define authority before volume

Write credit authority, offer matrices, and dispatch rules to the dollar in the SOW. Contract by queue with lever-matched credits. Wire network-aware routing and least-privilege OSS/BSS access before the first contact — an agent blind to node status is an expensive apology machine.

DAYS 30–90

Certify queues, shadow the save desk

Gate care and tech waves on your own QA rubric; run the save desk in shadow until its offers, tone, and reason capture pass finance and brand review together. Ship the reason taxonomy to pricing and network weekly from week one — it is the cheapest market intelligence the company will ever buy.

DAYS 90–180

Drill the outage, then hunt demand

Run a full outage drill — notification, deflection, surge waves — before weather runs one for you. With SLAs stable, point governance at demand itself: top contact-driver elimination, proactive-retention expansion, remote-resolution tooling upgrades. Certify steady state; hand over on dated criteria; keep the churn-cohort review standing.

THE FIVE FAILURE MODES WE ARE HIRED TO PREVENT

Routing cancel intent to the general queue · granting credit authority by custom instead of contract · buying one blended rate for three different queues · believing a 2008 telco logo over a 2026 save-desk export · meeting the provider's outage plan during an outage. All five are settled at selection and design.

Connectivity providers sell reliability and are judged on recovery — of a signal, of a bill, of a subscriber halfway out the door. The Philippine market, which learned its trade on exactly this work, still does it better than anywhere: 63% below onshore cost, benchmarks the baseline cannot touch, and surge machinery for the nights the network fails. Thirty-five providers genuinely qualify; a thousand will bid. The method in these pages — lever-tagged requirements, export-verified diligence, a fully transparent, fair, comprehensive, and highly competitive RFP — finds the six to ten that belong at your table, and keeps the signal well ahead of the noise.

METHODOLOGY & NOTES

How the numbers were built

Operating benchmarks (FCR, save rate, roll avoidance, dispute resolution, outage SLA retention, attrition) derive from PITON-Global telecom engagements active 2025–26, measured on provider ACD, OSS/BSS, and QA systems, validated in client governance. Baselines combine client pre-engagement data with onshore and commodity-offshore averages.

Cost figures are fully loaded — wages, benefits and statutory charges, facilities, technology and security stack, management and QA overhead, attrition-driven recruiting and ramp — net of shrinkage, at flat rates across 24/7 coverage; outage-surge seats price for active periods. US baselines reflect Tier-2 metro telecom-service labor including off-hours premiums; Manila figures reflect 2025–26 engagement pricing.

The case study is anonymized under NDA; subscriber counts, geographies, and event details are generalized, figures rounded. Value factors are conservative: churn defense counts incremental saves at ARPU margin over twelve months with offer costs netted; roll avoidance counts dispatches demonstrably redirected; rework value counts measured repeat-contact volume and audited credit variance only. ROI = net first-year value ÷ all engagement-related client costs. PITON-Global's advisory fee is provider-paid and appears at $0 in the client cost base; neutrality safeguards are documented at piton-global.com.

Market context draws on IBPAP reporting and PITON-Global's proprietary provider mapping (1,000+ operations; telecom capabilities re-verified July 2026). Estimates and projections are PITON-Global analysis and should be cited as such.

Which telecom BPOs belong on your shortlist?

Thirty minutes with John will tell you. Free to buyers, strictly vendor-neutral — an export-verified shortlist within two to three business days.

j.maczynski@piton-global.com
+1 402-598-8740

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