White Paper

Professional Services for Cloud

A Winning Ingredient for Service Provider Success

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Introduction

For many service providers, the call of the cloud has inspired a clear response. The explosive growth of Amazon Web Services and other public-cloud providers—coupled with the relevance of the network in the delivery of cloud and IT services—has led service providers to treat this game-changing market transition in IT delivery as a natural extension of their core business. Many wish to capture growth in the burgeoning cloud market, while preventing business customers from turning to the end-to-end offerings of rival providers.

Overall, it seems that the stars are aligned for service providers to capture this growth opportunity, which in its scalability and modular core product appears to be not that radically different from traditional network-based services.

But is this truly the case? As the Cisco® Internet Business Solutions Group (IBSG) has observed, a few SPs have deployed clouds boasting the same core functionality as their over-the-top counterparts, but most have fallen short in customer demand and adoption. In addition, enterprise customers seem more focused on internal, private-cloud solutions and look to SPs (at best) to complement their existing cloud infrastructure. For their part, SPs primarily offer a self-contained end-to-end solution. But the segment of workloads amenable to cloud *and* requiring a network-integrated service-level agreement (SLA), management, provisioning, and operations is smaller than expected. These factors present a fundamental challenge to the SP value proposition.

Nonetheless, this segment presents wide opportunities. The workloads in focus are usually more business-critical, interconnected, legacy-driven, and complex than the quick wins addressed by software-as-a-service (SaaS) players such as salesforce.com.

The challenge for SPs is to convince customers that these workloads would be better placed in a service provider's cloud. The solution is a carefully focused and finely tuned go-to-market approach. This will be essential if an SP aims to differentiate its business services from those of established systems integrators, as well as from the offerings of competing SPs.

In our observations of many SP go-to-market strategies, one particular challenge stands out: successful implementation of professional services (PS) to assist SPs' customers in planning, building, migrating, and operating cloud workloads. The importance of these front-end services has often been underestimated, but they are crucial to establishing credibility and trust with customers and for delivering on time.

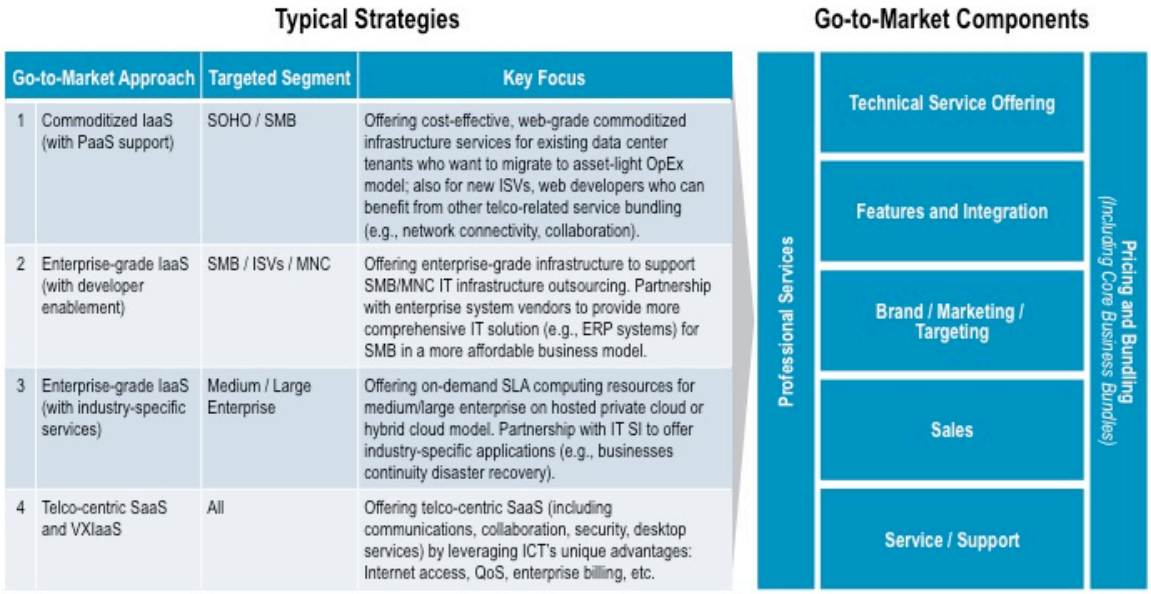
Based on 15 market interviews in Europe and emerging markets as well as IBSG deep-dive project engagements, this paper will explore why professional services are needed, what they should look like, and how they can be implemented. Beyond that, we will discuss how

the professional-services challenge can be solved within the context of an overall, successful SP go-to-market strategy for cloud.

SP Cloud Go-to-Market Components

Cloud is no longer a nascent market. There is already a highly diversified and specialized portfolio of cloud service providers who have aligned their specific end-to-end integrated offers with specific value propositions. As a result, SPs need to be creative in defining their go-to-market strategies for cloud, considering the sales channel, the potential of offering migration services, and commercial bundling and packaging. It is not a "build it-and-they-will-come" market or a case of simply selling a virtual machine on a portal. In reality, a new entrant to the cloud market will be unlikely to disrupt an incumbent's position in the commodity segment. SP cloud offers will need to create differentiation through a focused go-to-market strategy, while incorporating all the delivery components required around the strategy (see Figure 1).

Figure 1. SP Cloud Go-to-Market Components.



Source: Cisco IBSG, 2012

As shown on the left side of Figure 1, typical strategies are:

1. **Commoditized infrastructure as a service (IaaS).** SPs must consider holistic customer needs, but this strategy will appeal mainly for nonproduction and web workloads. Notably, this offering provides no network differentiation.

   Nevertheless, the commodity offer, if implemented, must not fall short of feature sets available from established players such as Amazon Web Services. Those feature sets include the buying experience and a broad spectrum of support tools and offers surrounding the core IaaS offerings. We believe that offering commodity cloud / infrastructure would bring little success to service providers at this stage of market development.

2. **Enterprise-grade IaaS (with developer enablement).** "Enterprise-grade" services resonate with the overall quality and brand positioning of SPs. As such, they represent a better strategy for differentiation. To be successful, this offering must integrate with on-premise IT environments and provide the end-to-end SLA required to run business-critical applications in the cloud. An SLA may refer not only to performance, but also to the security of the overall solution or the response and restoration commitments in case of a service failure. To make this offer attractive in the longer term, it must also be accessible for new-application development and offer developer / platform-as-a-service (PaaS) support.

   The winning ingredient, however, is strong application and migration support: that is, professional services. Enterprises will entrust these business-critical applications only to an experienced entity that has solid brand recognition in delivering high-quality services. Validating the security levels of a solution will remain a manual effort, since security issues stretch across multiple and separated domains. This offer would be logical for SPs with strong systems-integration capabilities (for example, Deutsche Telekom, BT, Orange, Telefonica, Verizon Business, AT&T, and many other big players).

3. **Enterprise-grade IaaS (with industry-specific services).** The enterprise-grade offering can be further enhanced by industry-specific extensions. Often, the extension will be focused on SP go to market and customization of an otherwise generic offer—again, a key capability embodied in a strong professional-services organization. In this case, the SP's consultative sale and migration process will extend into vertical-specific business processes (for example, the supply chain of a car manufacturer, or the typical interactions among banks). The aforementioned European SPs have or are currently developing such offers.

4. **Telco-centric SaaS and VXIaaS.** SPs can also provide SaaS offerings that relate to their core business. This can be through specific quality / networking requirements, as in a virtual experience infrastructure (VXI) or through collaboration deployments. In considering SaaS offers, it is critical to gain the ability to combine a technology implementation (and perhaps operation) with a change in the business process. Application and related business processes must be in sync to yield the anticipated benefits.

After choosing the strategy, the SP must implement an end-to-end go-to-market capability, as seen on the right side of Figure 1. The main point is that all elements of the cloud offer should align with the overall strategy to have a market impact. Some examples follow:

- **Technical-service offering.** If the strategy of an SP embodies a "premium" concept (for example, higher-grade SLAs or higher performance), this must be reflected in the technical service offering. In examples 1 and 2 above, SPs typically use different cloud-orchestration stacks: open source for the delivery of commodity cloud services, and commercial software for enterprise-grade cloud offerings.

- **Features and integration.** When the strategic focus is on developers, a host of development support offers will be expected, including PaaS, debugging tools, various programming languages, staging and testing environments, and automatic VM sizing. Simply offering a low-spec IaaS configuration will not be enough to attract

developers. Amazon Web Services is probably furthest ahead in offering additional developer features.

- **Sales.** Customers with a lower skill base will expect a lot of guidance throughout the cloud-offer process, and intangible qualities like trust and good teaming will become crucial differentiators. In this market segment, simply providing a portal to offer services will not suffice. The sales team must be ready to explain and argue the solution benefits to the relevant buying centers within a company. One SP told us that to reach small and medium-sized businesses, a "reseller channel is indispensable," as it combines "reach and personal service" with "low cost to serve."
- **Professional services.** In our opinion, professional services are the most underestimated component. Many SPs remain locked into the perception that "in cloud everything is automated" and "a portal alone will attract customers." As a result, many have not reached their full market potential. In reality, whenever the offer builds on SP-specific differentiation, professional services—either to sell and deploy, or to implement, migrate, and change—will be an essential element of the offer and the customer experience.

As this paper will further elaborate, all but the first strategy require strong professional services.

Why? The Importance of Professional Services

In this section we will examine the importance of professional services from "customer-needs," "competitor," and "market" points of view.

Customer Needs

Customers require professional services for three core reasons:

Skills gap. When enterprise and SMB customers consider moving their workload and applications to a cloud, they are often challenged by the risks and complexities inherent in the process. Since this is uncharted territory for many cloud customers, trust can be a key criterion when they choose their supplier. Trust builds on both proven reliability and on having an experienced and available personal contact. This is particularly relevant when a customer's internal skills are limited, necessitating external support to migrate and achieve agility improvements and cost-saving goals.

Risk. This is a particularly relevant issue if reliability, SLAs, and quality are part of the supplier value proposition. It requires that SPs speak the same language as enterprise customers and understand the business requirements of the service—not just the IT requirements. Enterprises are often concerned that migration will be more costly and take longer than expected, disrupting production IT systems. Therefore, experience in this process, along with sound program management, is highly appreciated.

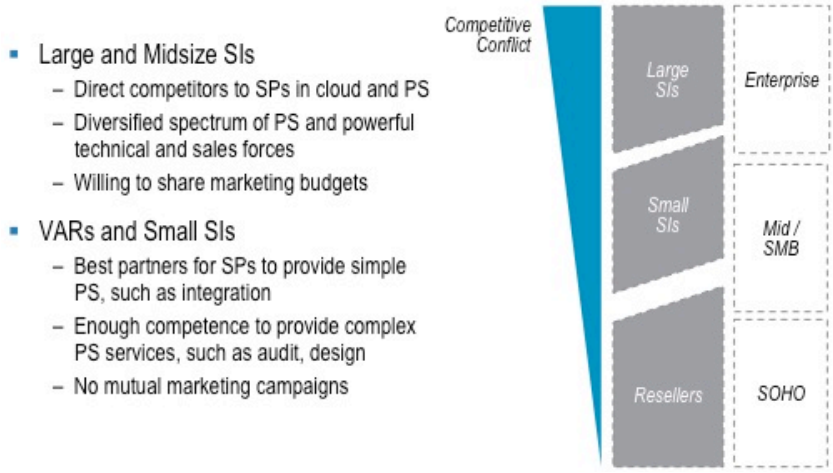
Temporary scale. Some enterprises may have the skills in principle, but lack the scale for wider implementation. They may also decide not to focus available skill on cloud transformation and migration as a matter of core/noncore tradeoff. A clear solution is external professional services that can tap into sufficient sources of outside talent.

However, service providers must consider not only customers needing professional services, but also the strength of competitors offering professional services.

Competitor Approach

In the segment of high-quality cloud services, SPs face the most significant competition from systems integrators (SIs). These can be stand-alone SIs, or equipment vendors with a strong SI capability. SIs usually have a great understanding of a customer's overall IT architecture and its past history. Often, they have implemented IT projects with a customer and know the relevant players, which poses significant competitive advantages. In addition, they are often organized into vertical practices that allow them to provide a better business context within a given IT challenge, while extending the known stakeholder network into the enter-prise's sales and marketing organization. In other words, they are very well positioned to address the skill, risk, and temporary scale challenges of their customers. Some have already built their own cloud infrastructure.

Figure 2. Systems Integrator Positioning.



Source: Cisco IBSG, 2012

Our interviews demonstrated that large and midsize SIs, as well as independent providers that have deployed their own clouds, usually have a strong focus on large enterprises. These SIs are capable of providing specific cloud vertical services accompanied by unique vertical PS knowledge—these could include professional services for healthcare or for investment banking communities. One example is Tieto, the IT services company based in Helsinki, Finland, which offers a cloud service to map the entire lifecycle of financial assets. CROC, a Russian provider, has deep vertical specialization as well. In this segment, overall IT competency far outweighs the relevance of the technical cloud offerings.

Small and midsize SIs with established cloud platforms can be oriented toward SMBs and small-office / home-office (SoHo) companies. Smaller SIs often specialize in specific technologies such as unified communications (UC), messaging services (MS), or security. This focus motivates strategy in every go-to-market component. In fact, many SIs prefer to focus on professional-services offerings as their core business. This creates an opportunity for SPs to complement their capabilities by offering core SP and IT infrastructure services.

We interviewed SPs offering cloud services in Western Europe, Latin America, and Russia about their go-to-market strategies for cloud and the relevance of professional services. While this was a limited set, some core observations emerged:

- **Size / segment needs differ.** SMBs want a complete, end-to-end solution, including network; enterprises want custom, complementary offers, often extending their existing private-cloud resources.
- **Need to touch the customer.** Because of the trust issue, personal service and contact are critical for SMBs and enterprises alike. High-grade cloud is by no means a service that can be sold via a portal alone.
- **Using internal capabilities.** In cases where SPs have built their own professional-services capability, they have often used existing, internal IT staff as a kernel of potential capabilities.
- **Using partners.** Though SPs appreciate the inherent competitive conflicts, market realities can force cooperation with SIs, especially if the alternative is losing the customer.
- **Importance of the end-to-end offer.** SPs must create an integrated proposition that addresses all customer needs, including connectivity.

Where SPs were successful in these markets, they had carefully built their brand in IT and enterprise services over a long period of time, often decades, and then added the cloud-service offering as an additional capability. As a stand-alone SP offering, cloud appears to be unsuccessful.

Market Sizing

The third motivation for SPs to offer professional services is the market opportunity.

Globally, spending on professional services related to building or implementing cloud services was $5.5 billion in 2011 and will increase to $20 billion in 2016—a growth rate of almost 30 percent per annum. The cumulative opportunity between the beginning of 2011 and the end of 2016 is about $72 billion.[1]

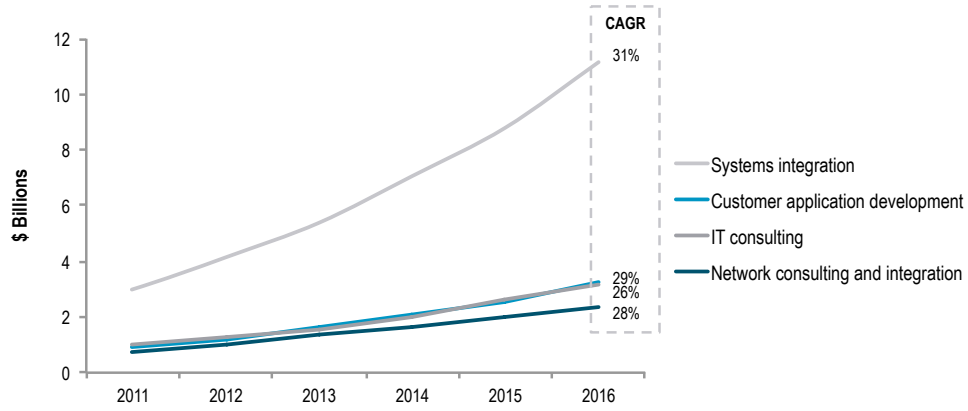
Out of the total of $5.5 billion in PS revenues (2011), about 50 percent ($2.8 billion) was generated from cloud apps (SaaS), $1.5 billion from PaaS, and $1.5 billion from IaaS. PaaS and IaaS PS services are demonstrating the highest growth, and we believe that the demand for PS will shift from application-centric PS toward more complex services, mainly involving deep IaaS and PaaS capabilities. We are certain that professional services will change (and become even harder to imitate or replicate) with cloud. Cloud takes away the need for basic operational services, but it demands a higher level of skill if professional services are to master complex cloud solutions.[2]

Systems-integration activities related to cloud are the largest services opportunity throughout the forecast period. In 2011, companies in the United States spent more than $1 billion

[1] "The Cloud Value Chain Exposed: Key Takeaways for Network Service Providers," Cisco IBSG, March 2012, http://www.cisco.com/web/about/ac79/docs/sp/Cloud-Value-Chain-ExposedL.pdf
[2] Ibid.

on systems integration (for example, cloud migration, integration, and deployment); likewise, worldwide spending was about $3 billion for the same period.[3]

Figure 3. Professional Services, Market Development.



Source: IDC Worldwide and U.S. Cloud Professional Services 2012-2016 Forecast

In 2011, Asia Pacific Excluding Japan (APEJ) represented 14 percent of worldwide spending on cloud professional services, but it had the highest yearly growth rate—35 percent—over the forecast period. Europe, the Middle East, and Africa (EMEA) represented 42 percent of spending and are forecast to grow by almost 31 percent. The Americas represented 43 percent of spending, with a 25 percent growth rate over the forecast period. As a general rule, cloud PS represents about 10-15 percent of the total cloud market, but is growing at a much faster rate.[4]

We have emphasized why professional services are needed from a customer perspective, from a competitive standpoint, and as a market opportunity. In the following section, we will investigate which services could be offered.

An SP Professional-Services Portfolio

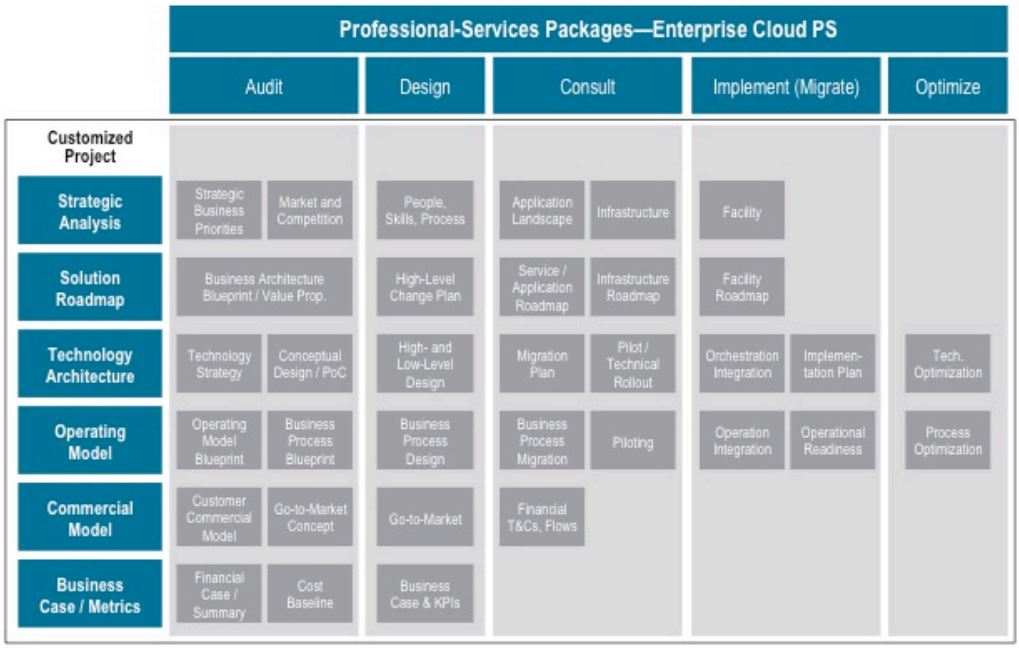
Clearly, the SP's professional-services offering should be segment-specific. Smaller companies are often looking for quick cost optimization of their ICT services, but don't have the time or skills to invest in that area.

In the enterprise segment, ICT needs require a dedicated project-based professional-services approach. Here, professional-services activities may be packaged in modules but are not predefined by cost and time. Audit and discovery will be crucial; they form the basis of the transformational PS engagement. The audit module covers the detailed audit and analysis of the customer situation, with a detailed report as the deliverable. The time and cost to perform the audit depend largely on ICT complexity on the customer side and the extent of the workload being shifted to the cloud. The PS activities for large enterprises are transformational and can take many months, sometimes even years. They require vertical

[3] Ibid.
[4] Ibid.

specialization as well as deep knowledge of application environments and their interdependency with provider infrastructure.

Figure 4. Enterprise Professional-Services Offerings—General View.



Source: Cisco IBSG, 2012

By contrast, targeting the SMB segment with professional services requires a strategy centered on standardization and scalability. PS services for the SMB segment need to be packaged with a limited set of options. Each package should offer a well-defined service with a fixed price tag so the customer understands the cost and value up front.

Below are a few short examples of such modular and prepackaged professional-services portfolio offerings:

- **Move from classical on-premise private-branch exchange (PBX) to a cloud-based voice and web-conferencing solution.** This package would include a concise audit of the customer's voice and LAN situation and requirements; consideration of what is possible and what's not; and the actual transfer of the workloads to the cloud solution, followed by administrator and user training. To address specific requirements, the service provider will need to develop a set of optional services most applicable to the business needs of the targeted customers. Such options are further illustrated in Figure 5.
- **Move the accounting platform to cloud.** This package should include: 1) a short audit of the accounting application requirements; 2) an assessment of the current and future security requirements; 3) the workload transfer itself; and 4) training to explain the new backup and disaster-recovery capabilities.

Figure 5. SMB Professional-Services Offers—Hosted Voice.

	Professional-Services Packages—Hosted Voice for Lower-Scale SMB				
	Audit	Design	Consult	Implement (Migrate)	Optimize
Standard Package **Includes:** • 20-50 licenses • Handset migration • Deinstallation of existing PBX • Gateway to PSTN	Current PBX setup and dialing plans LAN environment WAN connections	Hosted-voice solution LAN enhancements WAN enhancements	On scope, business process impact, change management, and benefits	Hosted-voice solution Provide post-implementation training and knowledge transfer	Six-month interval optimization
	1-2 days, 2 FTE; onsite activity	2- 3 days, 2 FTE; remote activity	4 hours, 2 FTE; onsite activity	2-4 days, 2 FTE; onsite activity	1-2 days, 2 FTE; onsite activity
Options Scope can vary by specific requirements and complexity	Security requirements	Security solution	Proposed security solution	Agreed security solution	Quarterly optimization
	1-2 days, 1 FTE; onsite activity	1-2 days, 1 FTE; remote activity	4 hours, 1 FTE; onsite activity	1-2 days, 2 FTE; onsite activity	1 day, 1 FTE; onsite activity
	Specific integration with legacy voice	Bespoke legacy voice integration	Legacy voice integration	Perform legacy integration	1 year: deinstall legacy integration
	1-2 days, 1 FTE; onsite activity	1-2 days, 1 FTE; remote activity	4 hours, 1 FTE; onsite activity	1-2 days, 2 FTE; onsite activity	1-2 days, 2 FTE; onsite activity

Source: Cisco IBSG, 2012

Many service provider incumbents have already developed and offer professional services for their network-centric services. But cloud is different; it is more IT-centric and not a natural strength for major SPs. So while SPs have some existing capability in running professional services, they must carefully plan the PS offer for cloud.

How? Options To Deliver SP Professional Services

It is not easy for SPs to build their PS capabilities organically. To augment their current capabilities, SPs can partner with systems integrators and grow their own capabilities over time. The advantage of partnering with a systems integrator is the immediate availability of skills, capabilities, and know-how. SPs can be selective in choosing elements of the systems integrator PS portfolio for partnering, picking only those services that complement their own offering. We found that, in many cases, an internal buildup would be resourced from the internal IT organization or grid team, where available.

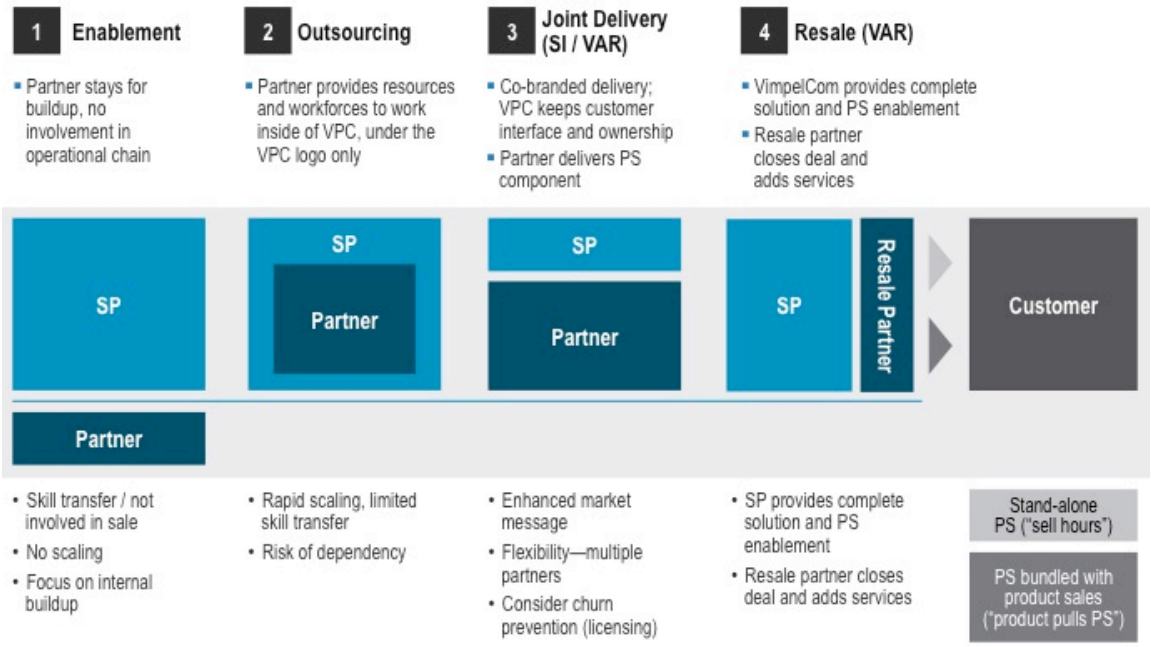
Partnering Options and Selection Criteria

In today's fast-paced business environment, there is little time to determine which service-delivery model provides the greatest business value to an SP. Our study considered four separate delivery models:

1. **Enablement.** External professional-services support stays for buildup; no involvement in operational chain
2. **Outsourcing.** SI provides resources and workforces to work inside of the SP, under the SP logo only

3. **Joint delivery.** Co-branded delivery; SP keeps customer interface and ownership, while SI delivers PS component
4. **Resale.** Value-added-reseller (VAR) SP provides complete solution and the PS-enablement resale partner (SI or value-added provider) closes the deal and adds some simplistic PS services, such as network audit. We have learned that some VARs are working closely with particular business centers, and they know the local area network (LAN) configuration of the network serving the business center's tenants the best. These models are shown and summarized in Figure 6.

Figure 6. Partnership Models To Deliver Professional Services.



Source: Cisco IBSG, 2012

We concluded that partnering is essential to reach smaller-scale customers and to address customers with transformational needs. SPs will need to customize their portfolio of service-delivery options to target these customer segments.

Enablement / outsourcing. These first two models represent an SP building its own internal competencies through consulting or insourcing of qualified personnel; we see them as temporary.

Joint delivery. Clearly, the market applies tough, demanding criteria for SI functional competencies. We recommend examining several essential criteria while choosing the partner to serve transformational accounts:

- Number of related PS projects and their success
- Number of certificates gained by reputable vendors such as Microsoft, Cisco, VMware, EMC, and others
- Number of qualified specialists for applications, hardware, solutions architectures, network and security concepts, and so forth

- Financial solidity of the business; longer-term profitability (EBITDA, revenues, debt)
- Availability of a network operating center (NOC)

Often, however, practicalities, compatibility of management, and concrete opportunities are the deciding factors, along with the history of the partnership. In particular, this can apply to larger SIs, which can control and dominate the customer relationship of joint SP/SI efforts.

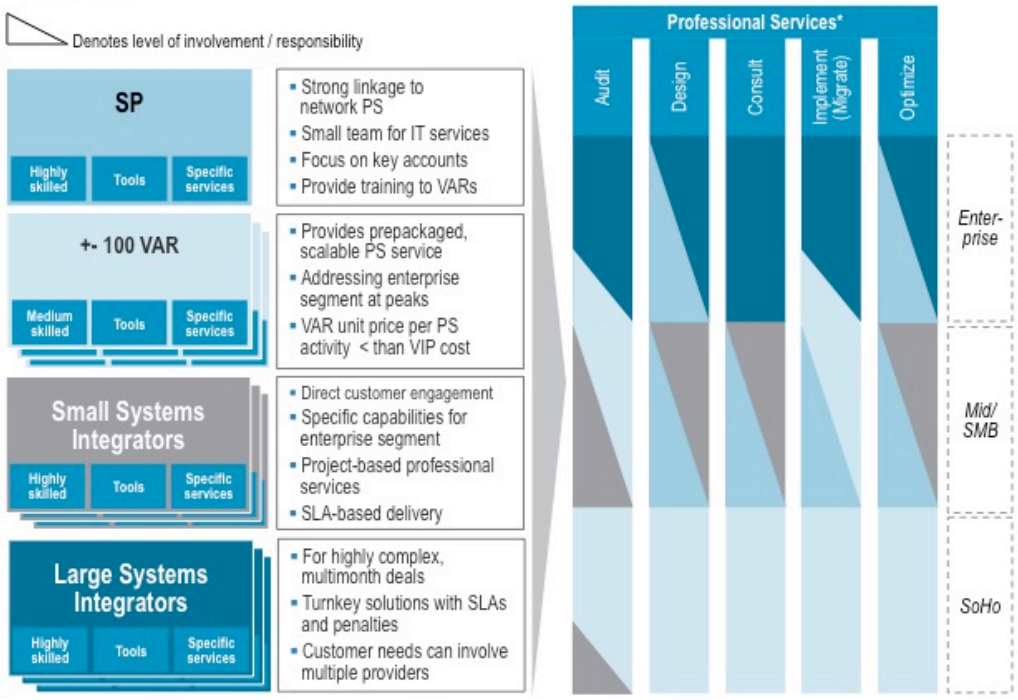
Resale. Small SIs/VARs usually provide simpler IT services and have a mono-vendor equipment portfolio. When it comes to providing PS to SMBs and SoHo customers, the factors influencing the choice of partner are slightly different, generally focusing on customer access:

- Customer reach by current footprint and segment specialization
- Financial stability, which can be a greater challenge for smaller businesses (but their smaller size also poses less risk for SPs, if they fail)
- Ability to operate jointly (operating model, marketing campaigns, SLA delivery)—small SI/VAR channels usually "own" the customer, but are reliant on support, so the SP/VAR relationship is less strained by competitive aspects

Operating Model

It is essential that in collaboration, SP/partner roles and responsibilities are clearly aligned and leverage the best capabilities of each player. Figure 7 depicts the professional-services lifecycle against customer segments, and how different types of SIs can contribute to delivery.

Figure 7. Partnership Matrix.



Source: Cisco IBSG, 2012

It is apparent that VARs will typically cover the SoHo space entirely, leaving some specialized auditing services (for example, security) to the SI segment—generally the cost to serve for professional services is too high for SPs. Of course, SPs can still sell their standardized telecom and IT solutions portfolio in this segment.

We found the highest versatility of professional-services offers in the midsize/SMB segment; as a result, many players can participate. VARs would usually focus on the more standardized pieces of services.

In enterprise, the effort would usually be led by the SI contributor, as engagements are typically transformational and directed from the business side. (Obviously, if an SP owns an entity that functions as an SI, the SP can also lead. T-Systems, the German IT services and consulting subsidiary of Deutsch Telekom, has worked in this capacity for many ERP migrations to cloud.)

Business Case

To offer a wide range of services covering all domains and cloud-delivery models, professional services are essential. However, capturing value and return on investment has become a challenge, as traditional measures fail to connect the new benefits and cost structure to business results. We built an internal business case for scenarios 1 and 2 in Figure 6—excluding partnerships.

SPs and SIs have developed varying levels of PS for cloud. At times, this results in detailed financial metrics that are less accessible or less meaningful. While the least mature companies have been looking only at the direct cost benefits of cloud infrastructure and PS, the more mature ones have linked their metrics to business outcomes.

Some cloud offerings may require relatively few PS hours; this is where partnering is crucial.

We have developed the business case for different services, correctly selecting the workloads where PS provides true business benefits. According to our estimates, the average profitability margin varies from 15 to 25 percent depending on the particular PS and delivery model. In other words, PS economics are not compelling for SPs as a stand-alone offer, but act as a pull-through enabler for product offers, potentially improving the loyalty of large enterprise customers.

Figure 8. Major Assumptions.

CATEGORY	IMPACT ON PROFITABILITY	ASSUMPTIONS / COMMENTS
Revenue		
Markup on Loaded Cost Per Hour	✓✓✓	100%
Number of Hours Sold		Depending on cloud product
Billed hours		Result of # of PS buying events
Hours spent off-customer and unbillable		Skills improvements
Free hours for business development		Free hours for customer to develop business; assumed 25% of PS billed hours
Percent of PS Buying Events	✓✓	Depending on cloud product
OPEX		
FTE Cost		Fully loaded headcount cost
Salary		Current average cost of FTE
Office cost		Office and workplace cost
Personnel cost		Taxation and other social
Lead Time To Hire and Train New People		
Cost of hiring new people		Payment to hiring agency of HR
Anticipation cost		Preparation for new employee to start delivery of service
Onboarding cost		Computer and other office equipment
Resource Utilization	✓	Best-observed figure of 70% will be lower in initial deployment and launch—consider marketing efforts
Insourced and Outsourced PS	✓✓	Some PS services can be outsourced from SI or VARs
Marked Up for Outsourced PS		Higher-loaded cost per hour (+30%)

Source: Cisco IBSG, 2012

Regional Differences

Mature markets, such as the United States, continue to lead in cloud professional services because of their size and high adoption rates for server virtualization. Adoption rates for private and hybrid clouds have increased as government organizations lead the cloud trend, forcing large enterprises and SMBs to follow.

We believe that Europe will continue to lag two years behind the United States. Although interest is high in European nations, regional diversity and economic concerns will continue to slow deployments—and, therefore, PS—in the more than 40 countries on the continent.

Mature New World markets (including Australia, New Zealand, Singapore, and Korea) have the highest levels of regional spending on professional services. In these markets, significant investment has transformed legacy environments into private clouds, while integrating external cloud services. Much of this work has been driven by a need to replace aging infrastructure.

In emerging markets, IT skills are in even greater shortage. Furthermore, many companies have outsourced their IT and network infrastructure, placing a low ceiling on the performance of public-cloud infrastructure. However, cloud momentum is building rapidly and IDC, the global market intelligence firm, anticipates a faster ramp-up in adoption over the 2010-2015 period—increasing the five-year compound annual growth rate by 8 percent (to 69.4 percent). In emerging markets, private and hybrid clouds will be preferred for the next three years, owing to the previously stated reasons. It is quite likely that in emerging markets, cloud migration will be a largely supply-constrained process, with professional services for cloud being a sparse resource.

It is also worth noting that in the emerging regions with strong small and medium enterprise (SME) segments and diversified verticals (including Turkey, India, and China), cloud services—and, therefore, PS—have a large opportunity to develop faster than in countries where gross domestic product (GDP) is heavily influenced by a limited number of companies largely within one particular vertical segment (for example, Russia).

Conclusion

Increasingly, SPs will be compelled to focus on a differentiated offer of cloud services, and professional services will need to be viewed as a crucial part of their offer. This paper has expounded on the background and motivation behind cloud professional services: the types of offers that should be provided; whether they should be delivered internally or with partners; and the key economic drivers.

For SPs, standardizing the approach to professional services is the next logical step beyond cloud services. Cisco can help establish these standard modules and offer training and development. Much of this can follow the partnering options described in Figure 6 (Partnership Models).

Once these milestones are accomplished, SPs can begin to reap the great success promised by extending a full range of professional services to their clientele.

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