

# Hunting for Profit

How to find profitable growth serving the dynamic SMB technology market

Nathan Marke, COO

**GIACOM.**

 **analysys  
mason**

# Valuation being driven by the basics

**Revenue growth**  
Being in high growth markets

**Gross profit growth**  
Having a differentiated proposition  
Cross-sell  
The 'stickiness premium'

**Cashflow**  
Recurring revenue model  
based on subscription

£'000

<b>Revenue</b>
Revenue growth %
Cost of sales
<b>Gross profit</b>
Gross profit %
Direct costs
Staffing costs
Other indirect costs
<b>Adjusted EBITDA</b>
EBITDA margin %
Exceptional items
<b>Reported EBITDA</b>
Depreciation and amortisation
Acquisition intangible amortisation
<b>Operating profit</b>

**Profit growth**  
Operational efficiency



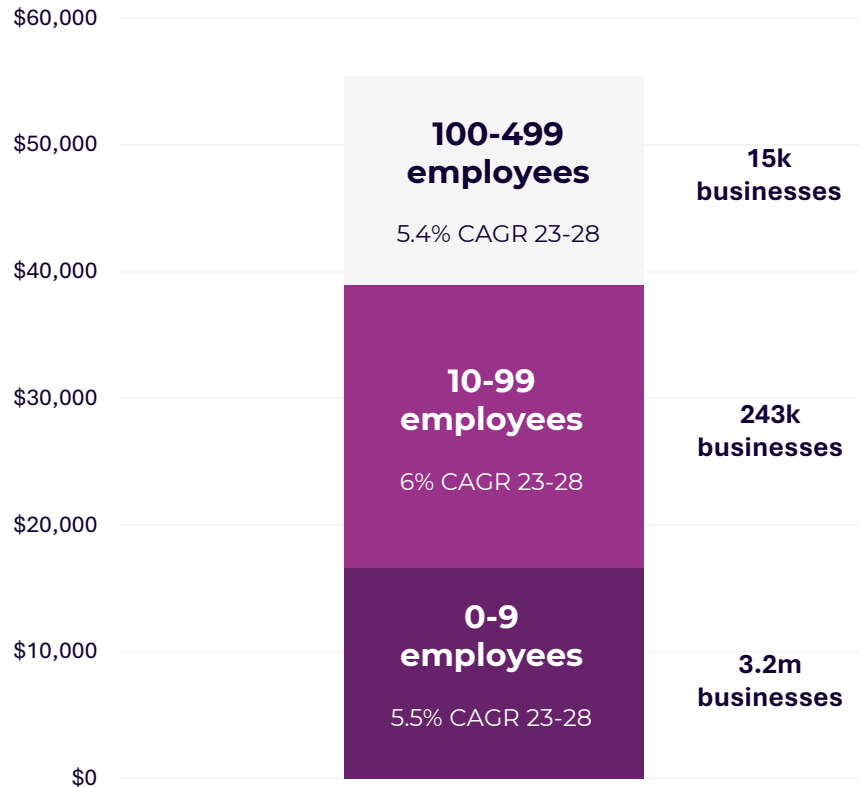
An aerial photograph of a city skyline at sunrise. The sky is a mix of blue and orange, with the sun low on the horizon. Several skyscrapers are visible, some partially obscured by a thick layer of fog or mist that fills the lower part of the frame. The buildings are dark against the bright sky. The overall mood is one of growth and modernity.

# Grow Revenue by being in growth markets

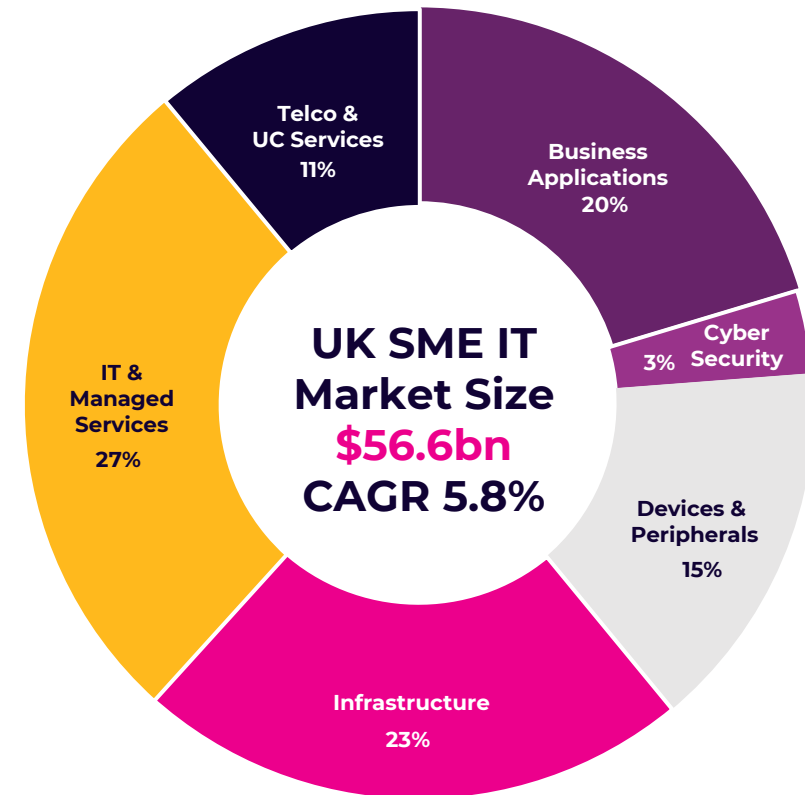
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# UK B2B Comms and IT market

## UK SME IT Market Spend Forecast 2024 by size of business



## UK SME IT Market Spend Forecast 2024 by Technology Category (0-500 employees)



# Business Applications

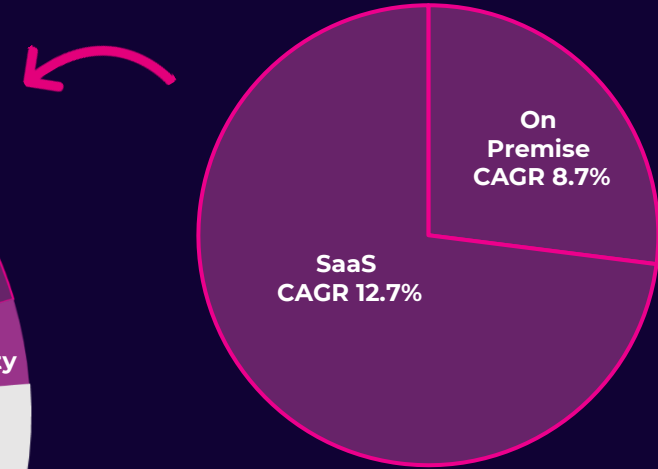
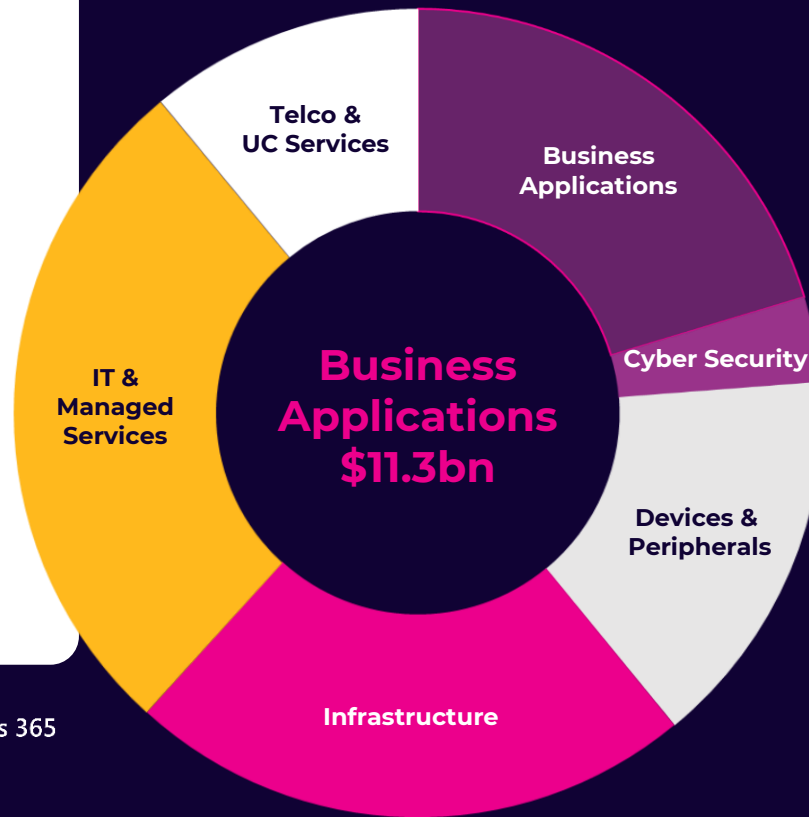
11.6% CAGR 24-28

## Growth drivers

- Business Process Automation
- Cloud transformation
- AI push

## Hotspots

SaaS LOB	CAGR 17.4%
SaaS BI	CAGR 14.7%
SaaS Productivity	CAGR 14.0%
SaaS ERP	CAGR 12.1%
SaaS POS	CAGR 12.1%
SaaS Email	CAGR 11.8%
SaaS Finance	CAGR 10.7%
On premise LOB apps	CAGR 13.3%



Microsoft 365

Microsoft Power Platform

Dynamics 365

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# Infrastructure

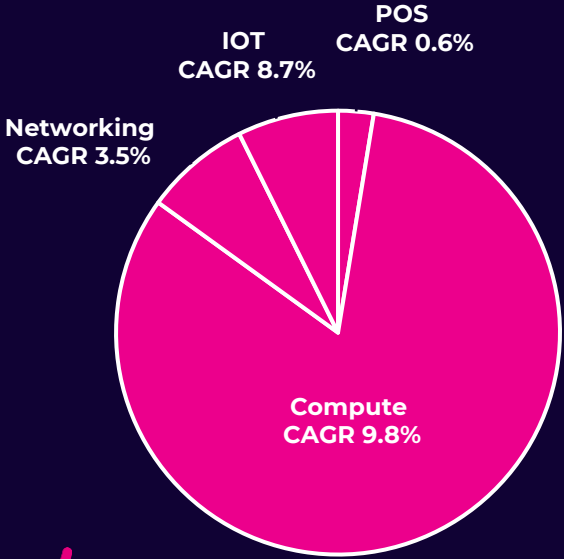
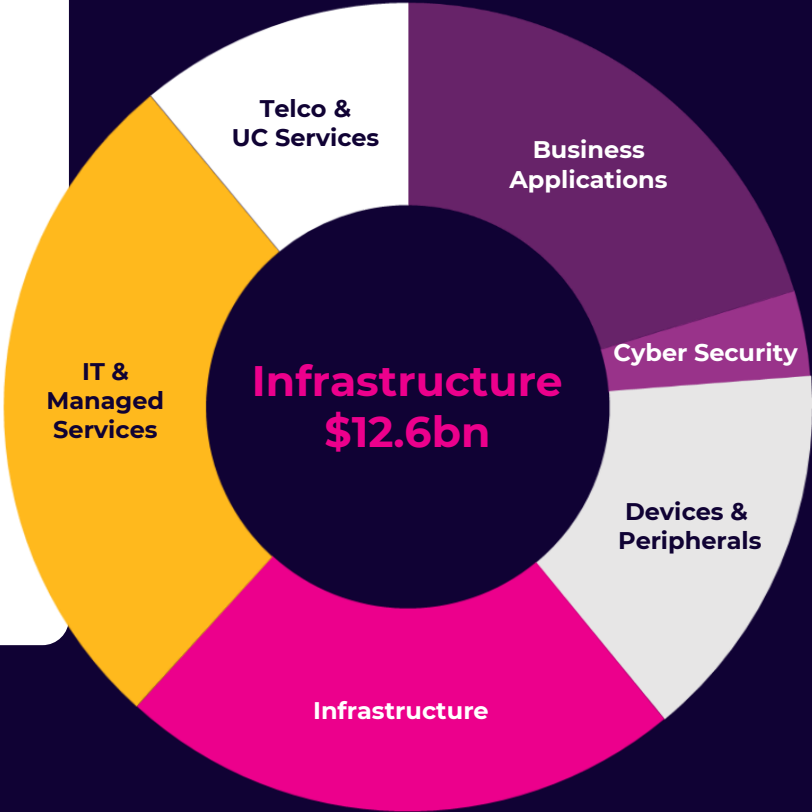
8.1% CAGR 24-28

**Growth drivers**

- Ability to support modern software
- Shift to Cloud
- Data growth
- IOT

**Hotspots**

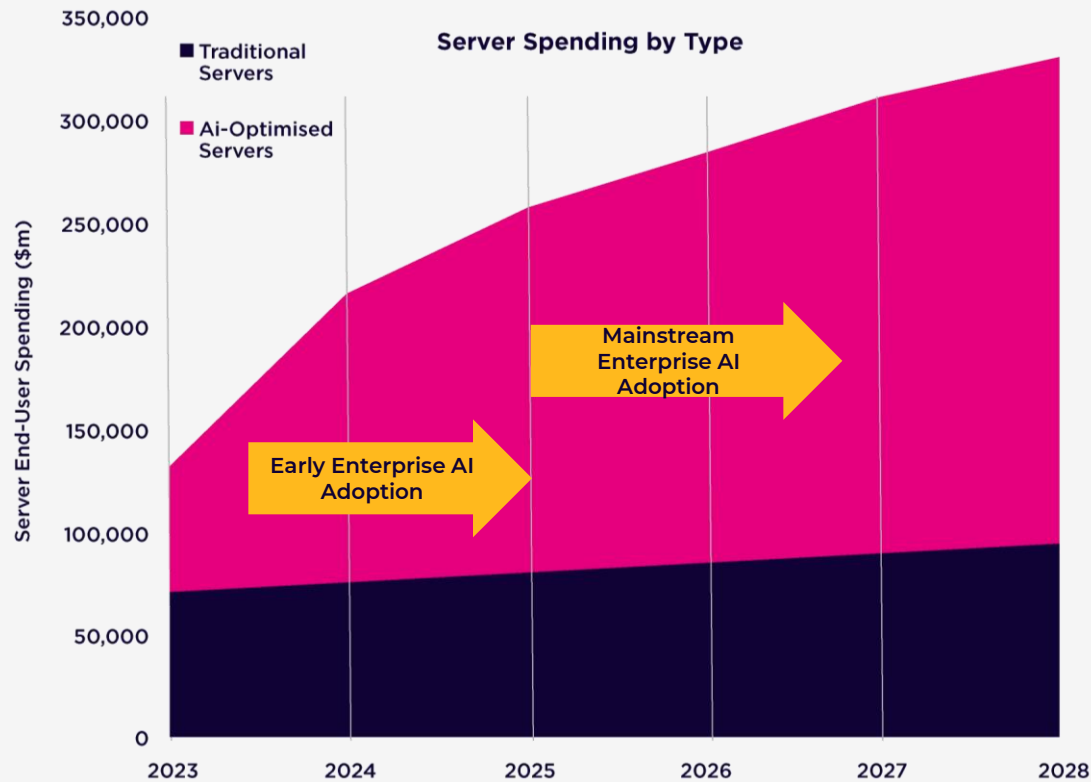
IaaS	CAGR 16.7%
PaaS	CAGR 15%
CoLo	CAGR 11.5%
SaaS Database	CAGR 8.8%
Virtual desktop	CAGR 18.0%
Cloud VPN	CAGR 14.4%
Mobile app dev	CAGR 8.1%
IOT	CAGR 8.7%



Source: Analysys Mason SMB Technology Forecaster May 24

# What about AI?

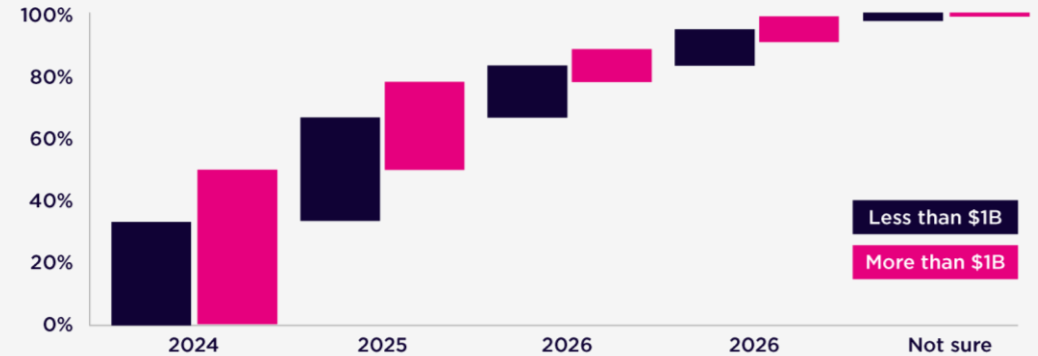
## AI Server investments top \$300bn in 2028



Hyperscalers, service providers and ISV's building out their AI capability in preparation for general adoption

Source: Gartner Global IT Spending Forecast 3Q24

## Mainstream business adoption of AI/GenAI by Large Enterprise in 2025



81% of large enterprises and 67% of medium businesses will have a significant deployment by end 2025

83% of this will be embedded in existing applications

SMB's will mainly consume AI as out of box functionality in their software

Will drive move to cloud, and services for data engineering and security

3-year lag?

Source: Gartner CIO Survey 3Q24

# Cyber Security

7.4% CAGR 24-28

## Growth drivers

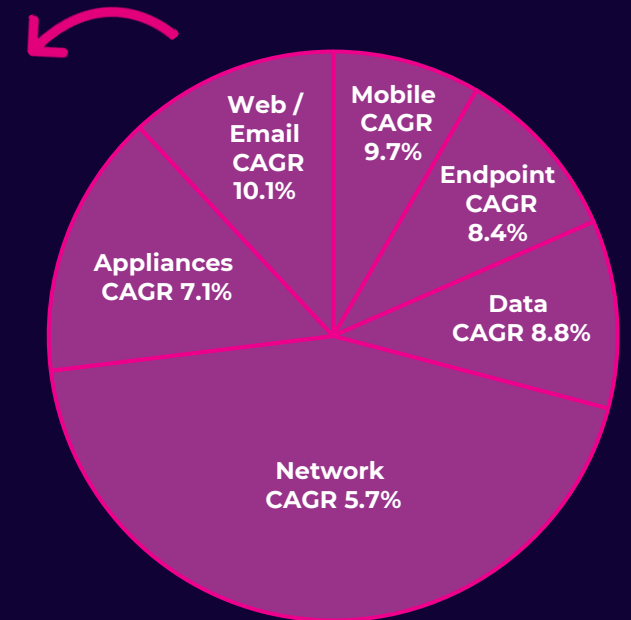
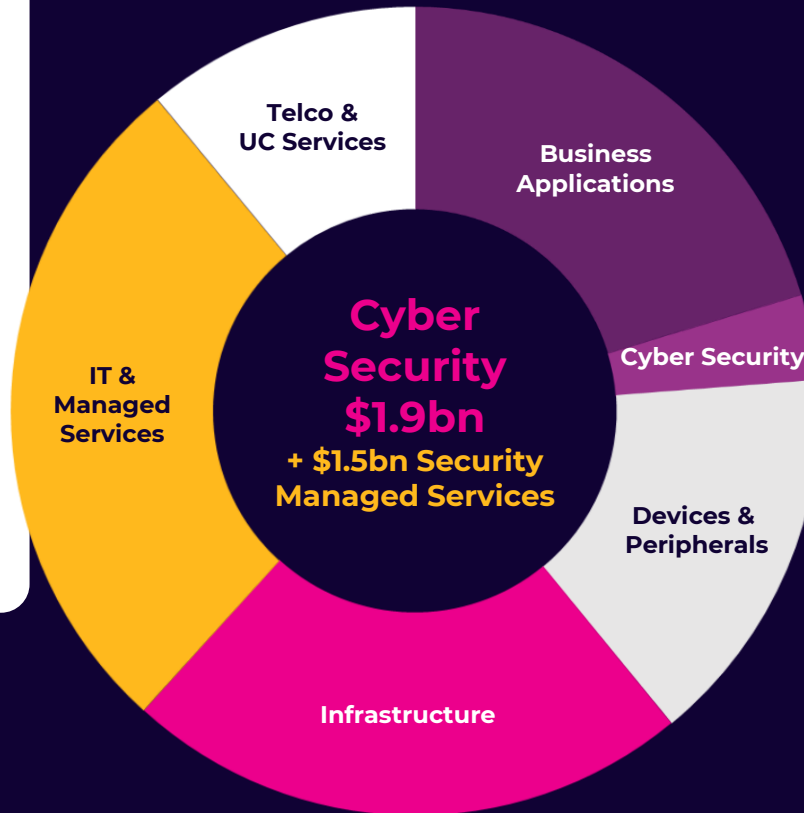
#1 priority for SMBs due to increasing awareness of cyber threat

Compliance

Security 'baked-in' to solutions (e.g. Business Premium)

## Hotspots

EDR	CAGR 16.6%
Email	CAGR 14.1%
ID and Access Mgmt	CAGR 12.9%
End point protection	CAGR 12.1%
Mobile security	CAGR 12%
Data Security	CAGR 11.76%
UTM software	CAGR 8.1%
Web security	CAGR 7.4%



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# Devices

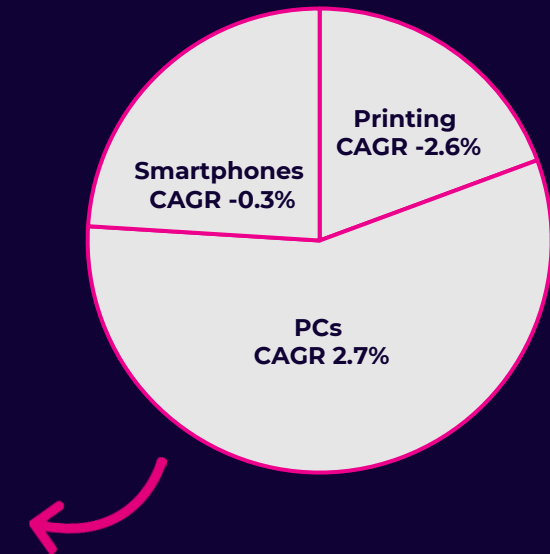
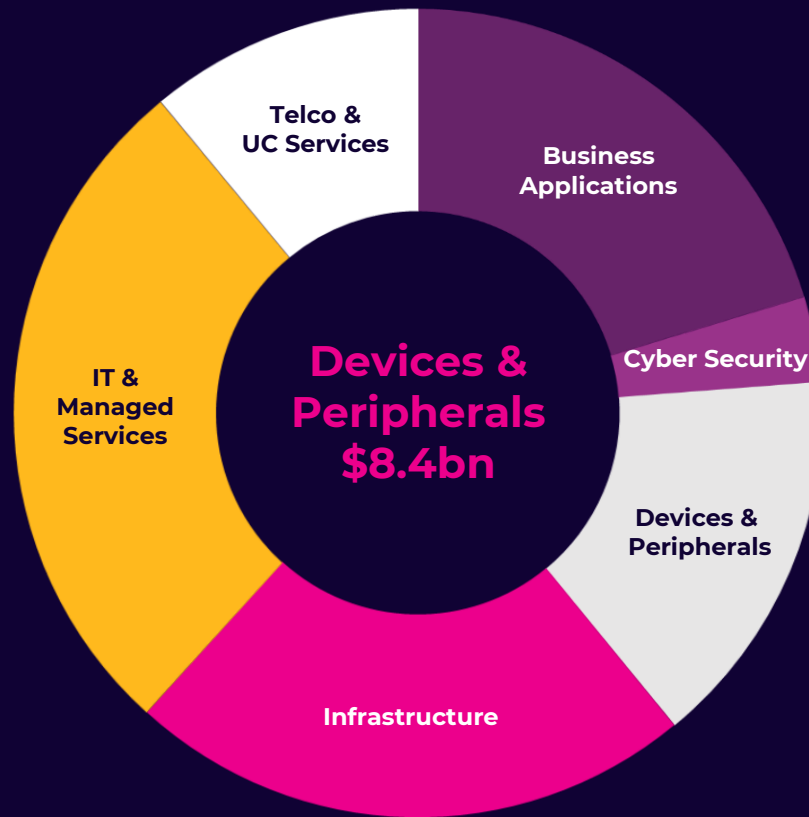
0.9% CAGR 24-28

## Growth drivers

Ageing device estates  
Windows 11  
Modern workplace  
AI PCs

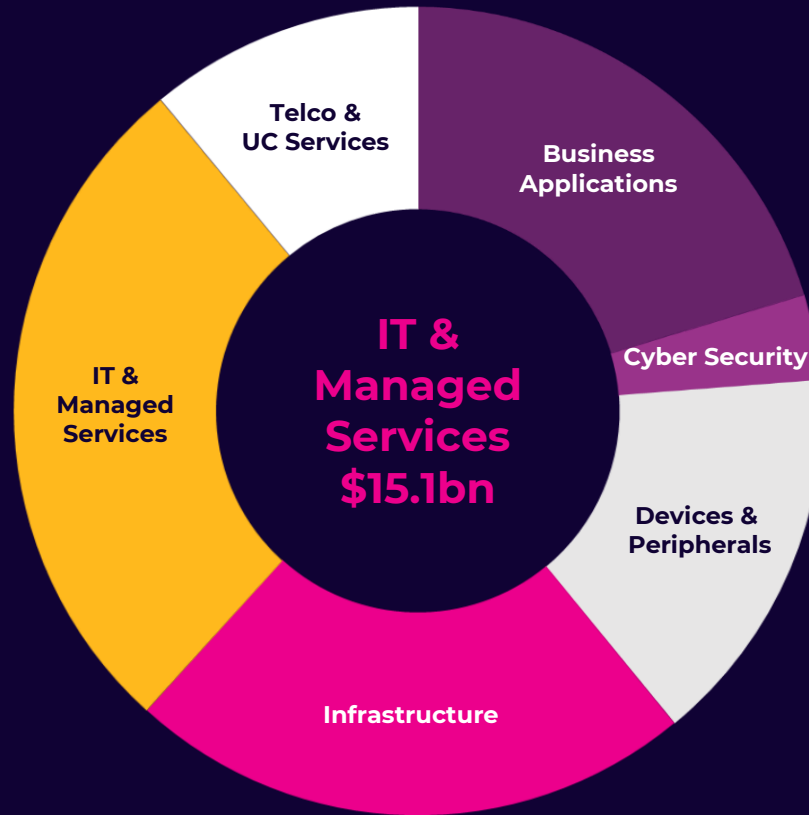
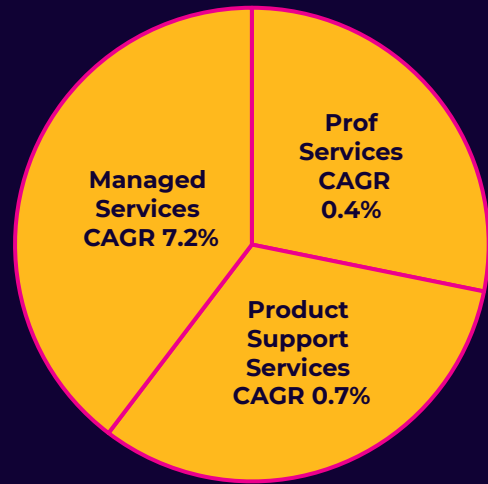
## Hotspots

2-in-1 PCs CAGR 9.1%  
3D printers CAGR 16.3%



# IT Services

2.5% CAGR 24-28



### Market Drivers

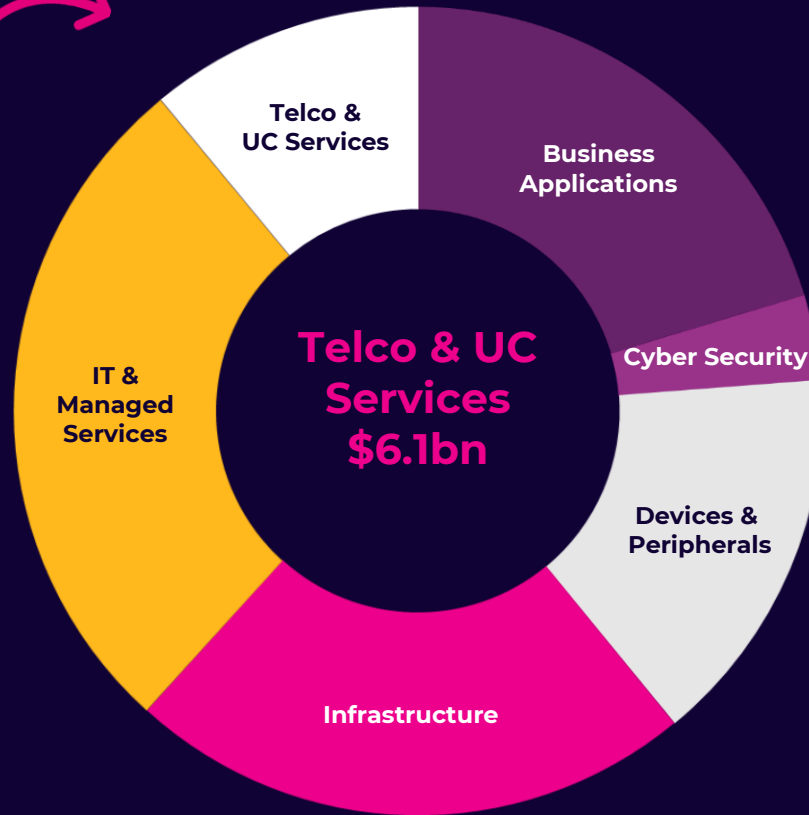
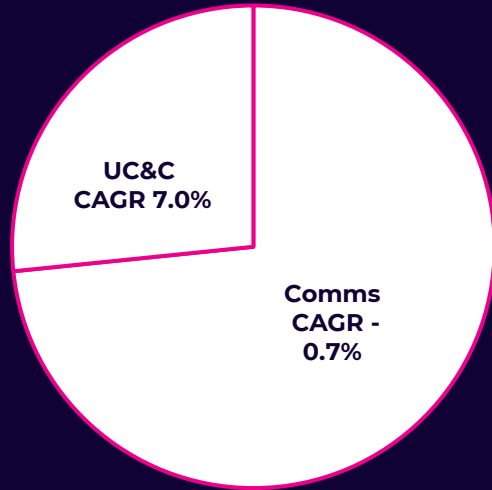
- Reliance on IT
- Remote IT
- Always on services

### Hotspots

Mobile Managed Services	CAGR 16.1%
WiFi Managed Services	CAGR 11.4%
Security Managed Services	CAGR 10.4%
Server Managed Services	CAGR 6.2%
Storage Managed Services	CAGR 8.3%

# Telco & UC Services

2.2% CAGR 24-28



## Market Drivers

Modern workplace  
PSTN switch off - All IP

## Hotspots

UCaaS / Hosted voice	CAGR 13.5%
SaaS Collaboration	CAGR 8.8%
Video conferencing	CAGR 6.2%

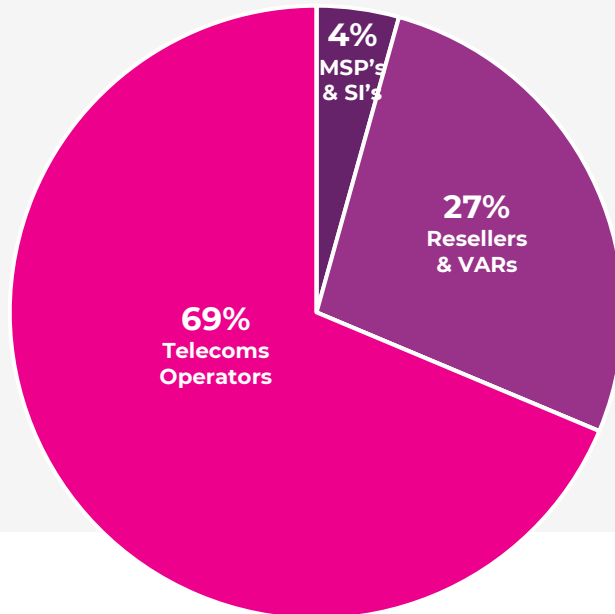


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# Telecoms – a huge, margin rich opportunity in your existing customer base

## Mobile Airtime Route to Market

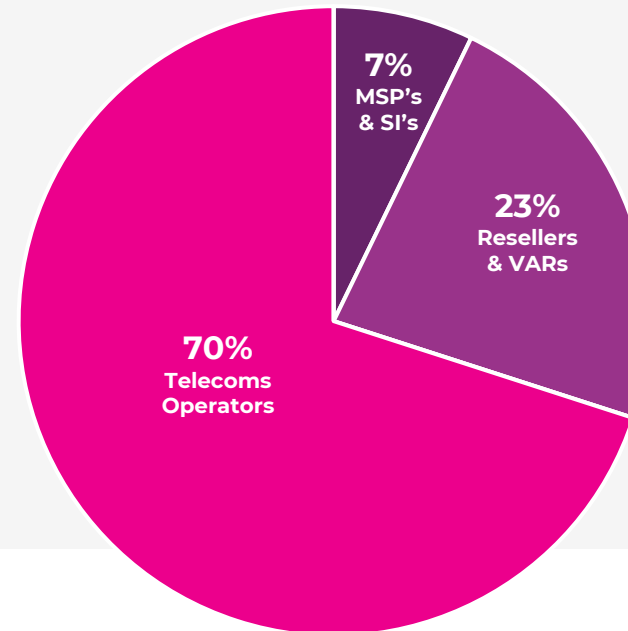
UK SMB 1-500 Employees



**\$1.75bn** 2024 Market Size

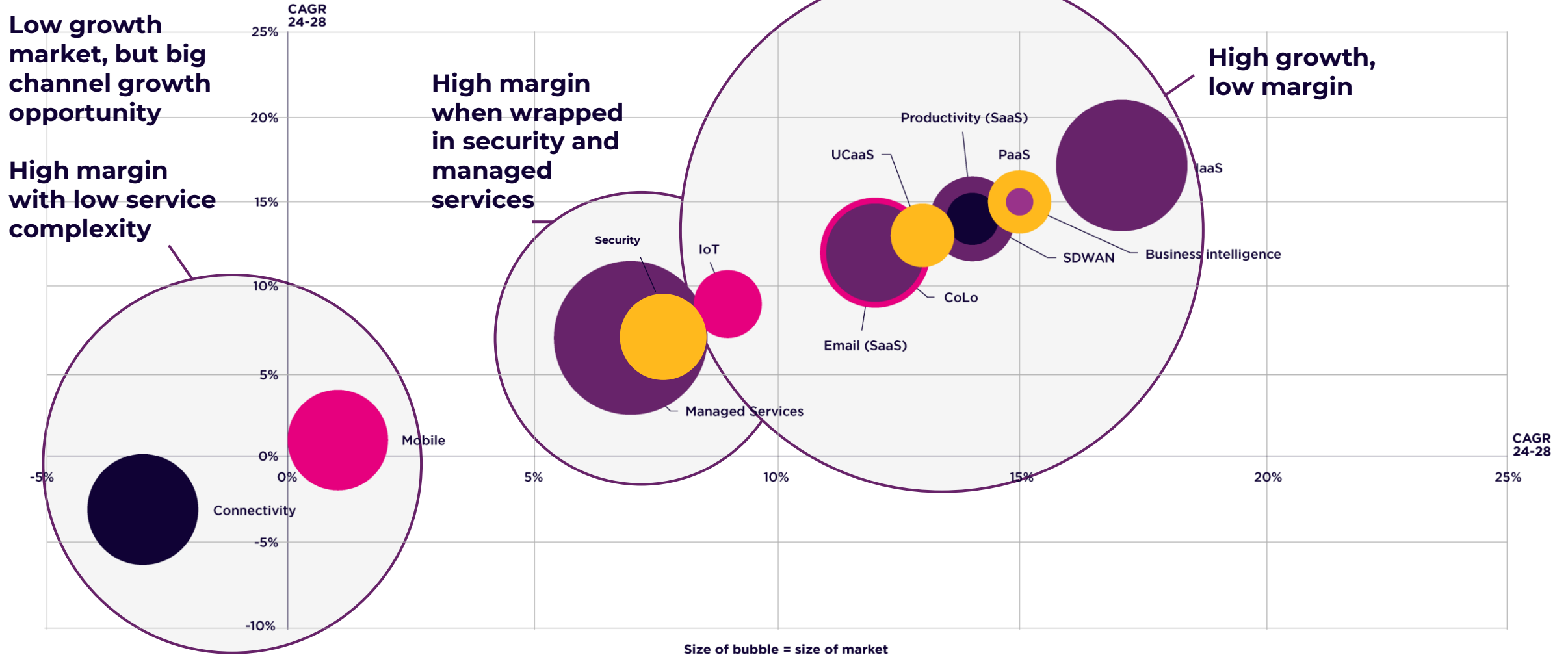
## Connectivity Route to Market

UK SMB 1-500 Employees



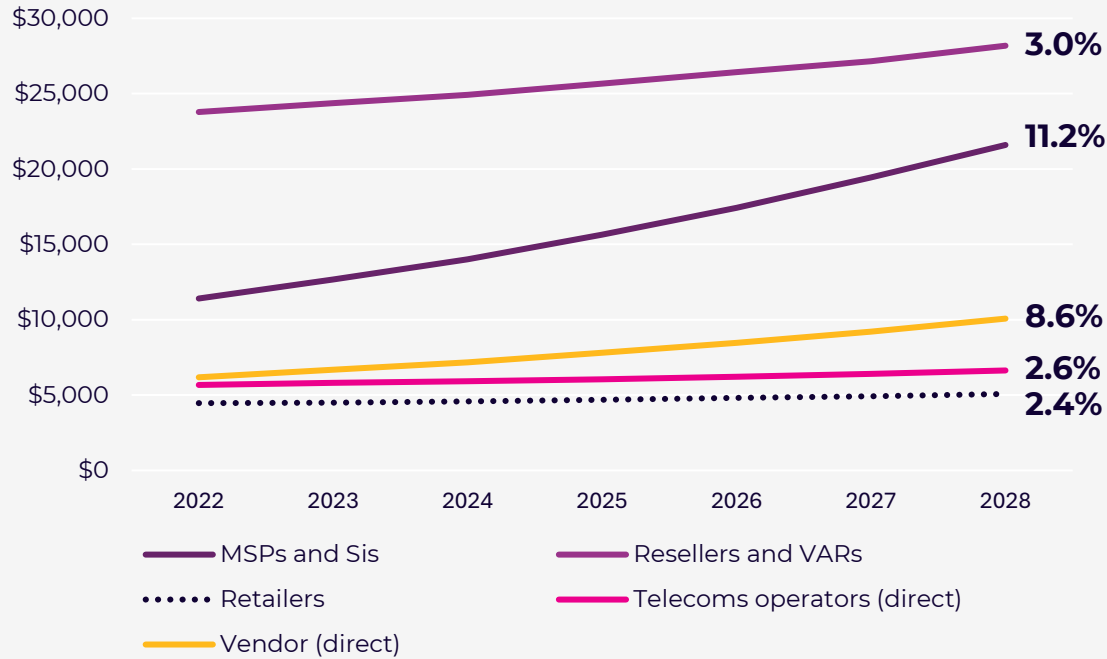
**\$2.2bn** 2024 Market Size

# Comparing growth and market size for key product segments



# The Rise of the MSP

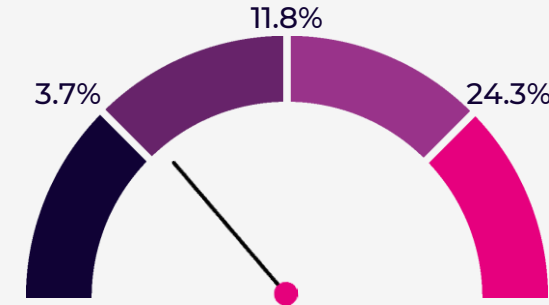
## UK SMB Technology Spend by Route to Market



\*MSP defined as a channel business that derives at least 30% of its revenue from Managed Services

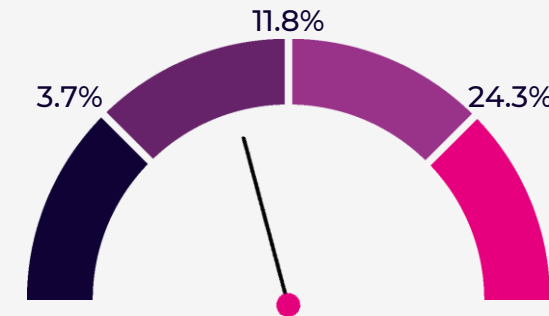
Source: Analysys Mason SMB Technology Forecaster May 24

## Comms & IT Resellers



Organic Growth  
**CITR Median: 4.6%**

## IT Managed Services



Organic Growth  
**ITMS Median: 9.9%**

Source: Megabyte

# Grow Gross Margin and Cashflow through differentiation

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# SME IT Challenges

UK workers lose an average of **46 minutes each day** due to preventable IT issues

**84%** of UK businesses reported cyber attacks in 2024

Source: Currys SME IT Survey 2024

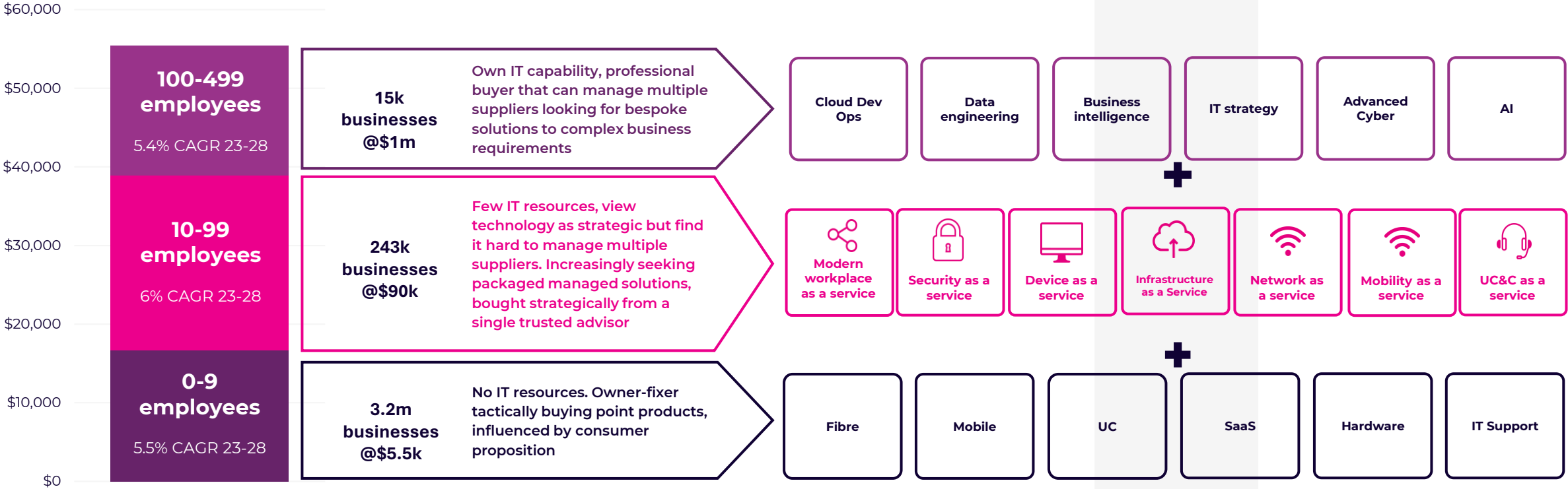
Unplanned downtime  
Unplanned cost  
Keeping up with technology  
IT 'not right'



# Segment your base

## Buyer and solution personas

**UK SME IT Market Spend Forecast 2024**  
by size of business



# Packaged managed solutions examples

End Customer

Value prop

Reliable IT  
Predictable cost

Modern work

Help me sleep at night

Modern infrastructure

Performance & availability

Work from anywhere

Customer service



Modern workplace as a service



Security as a service



Device as a service



Infrastructure as a Service



Network as a service



Mobility as a service



UC&C as a service

IT Service desk

- Win 11
- Microsoft 365
- Backup

- Good
  - Firewall, Email and DNS Filtering, MFA, Endpoint, Backups, Training, Admin rights management
- Better
  - Patch mgmt, EDR, Incident response
- Best
  - XDR, Zero Trust, Active threat Hunting, Red teaming and pen testing

- Laptops
- PC's
- Printers
- Lifecycle services

- Azure VMs, Storage, Services (backup, recovery)
- Migration tools and services
- CoLo
- On Prem Servers and Storage
- Cost optimisation

- Ethernet & Broadband
- 4G Backup
- WAN/SDWAN
- LAN / WiFi
- Voice
- Network security

- All you can eat airtime packages
- SIMs
- Smartphones
- MDM
- Deployment services
- Refresh services

- Teams Voice
- Giacom HVS
- Operator Connect
- Call recording
- Data and analytics
- Headsets and handsets

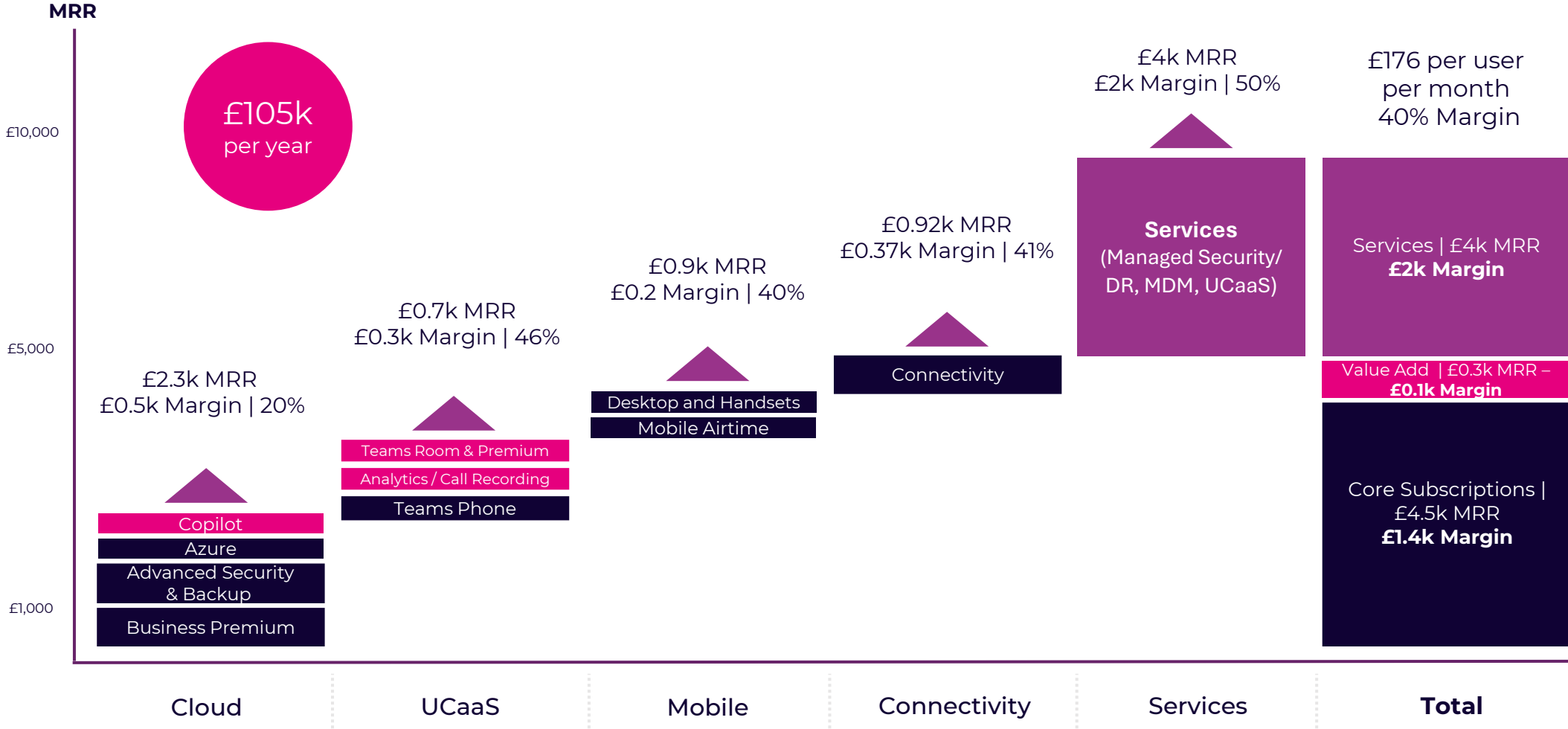
Automation/AI and data-led Managed Services and FinOps

Price per user per month, fixed price onboarding plus rate card project costs

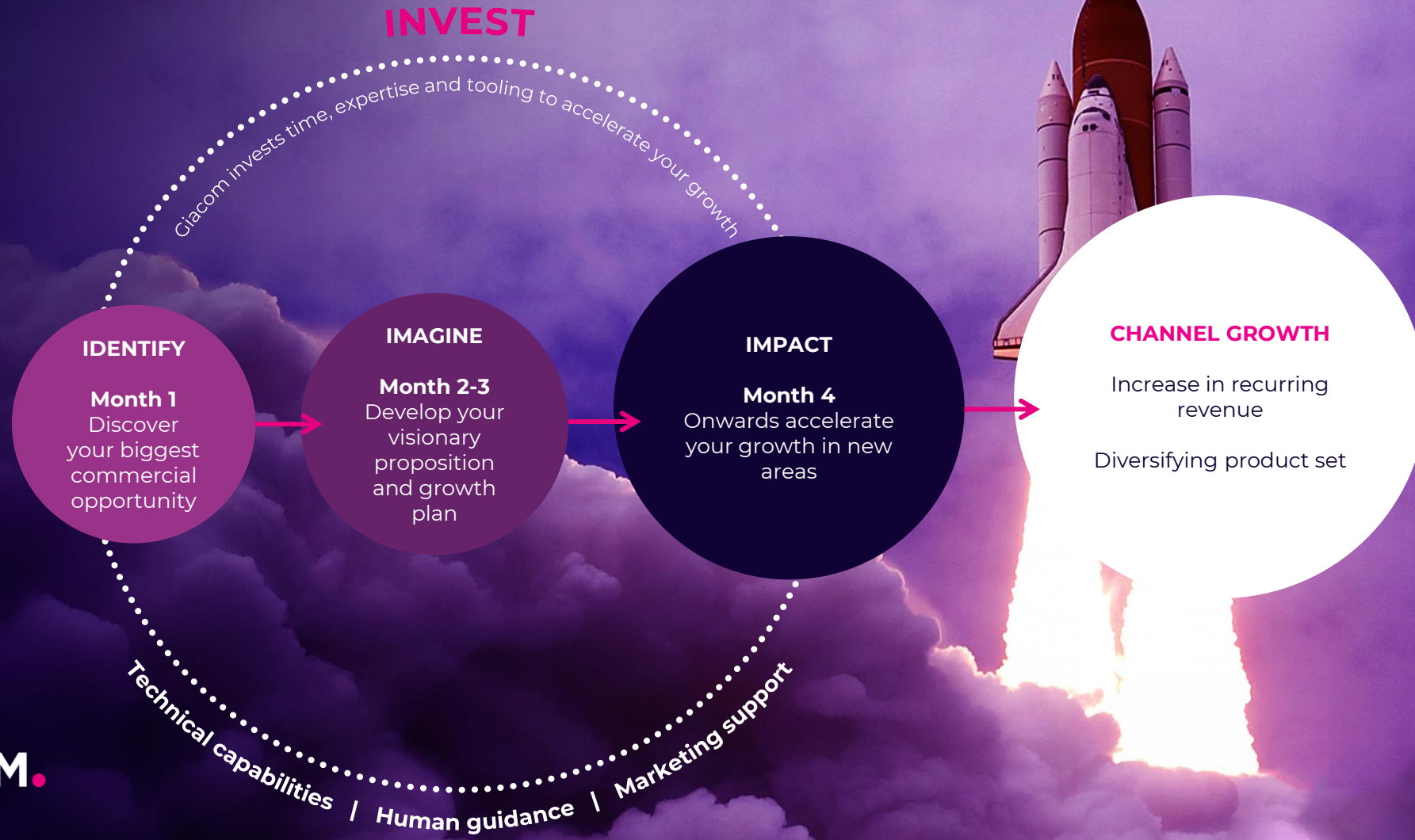
# The Goldmine in your customer base

Create a 'Stickiness Premium'

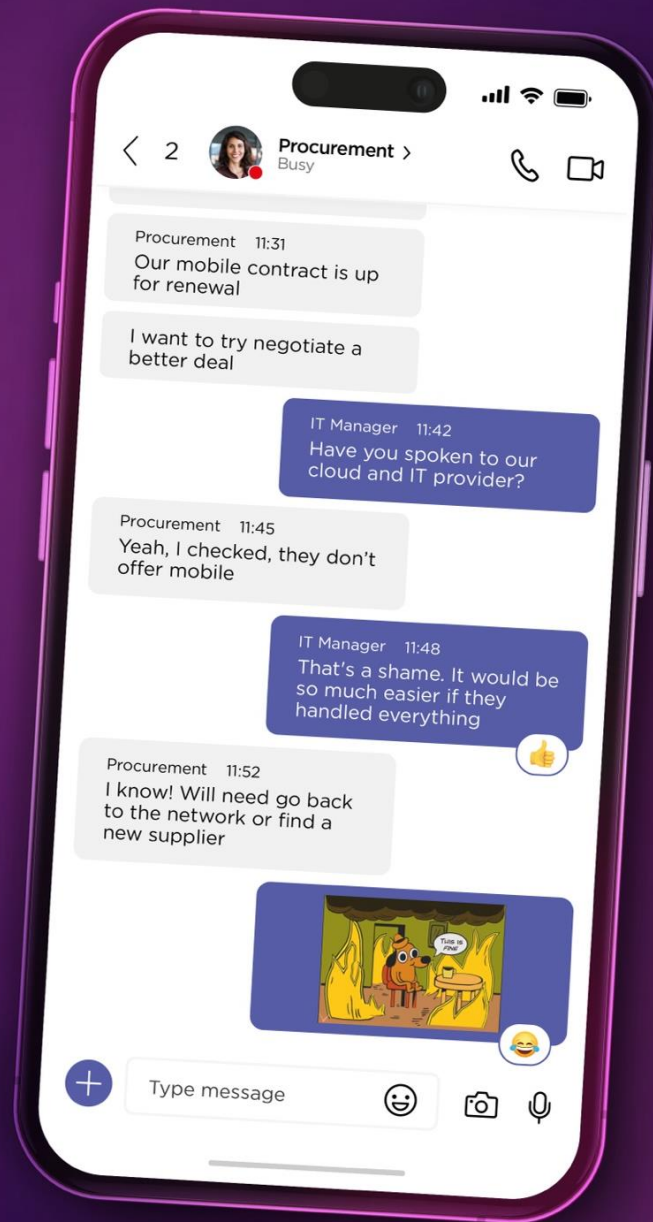
50 Employee Business



# Growth Accelerator



**MSPs!  
DON'T  
LEAVE  
MOBILE  
ON THE  
TABLE**



# Office in your pocket? Simple



Tariffs and commercials  
as simple as SaaS



Giacom  
Business  
Basic



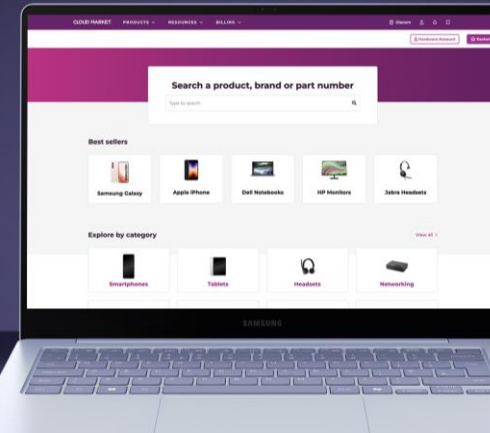
Giacom  
Business  
Standard



Giacom  
Business  
Premium



Sell the latest smartphones as a  
service – connected device



**We are looking for 20 MSP's to sign up**

**Soft launch January 2025**

**Including**

**Exclusive early access to 3 simple MSP mobile user packages**

**Simple ordering and management via Cloud Market**

**Sales support and Marketing Content**

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**Find Big AI**



A high-angle, rear-view photograph of three runners on a purple track with white lane markings. The runners are positioned diagonally from the bottom-left towards the top-right. The runner in the foreground is wearing a light orange tank top and black shorts. The middle runner is wearing a teal tank top and blue shorts with a white number '6' on the back. The runner in the background is wearing a dark blue tank top and dark blue shorts. The background is a solid purple color with white curved lines representing the track lanes.

Helping you  
drive EBITDA  
growth?

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## **Welcome to Giacom Cloud Market**

A 100% channel-only B2B technology platform that makes it simple for Technology Resellers and MSPs to access cloud, comms and hardware products and services - from the world's leading vendors and carriers – to create brilliant solutions for their business customers.



**CLOUD MARKET.**

**GIACOM.**

## Accessing Cloud Market couldn't be simpler

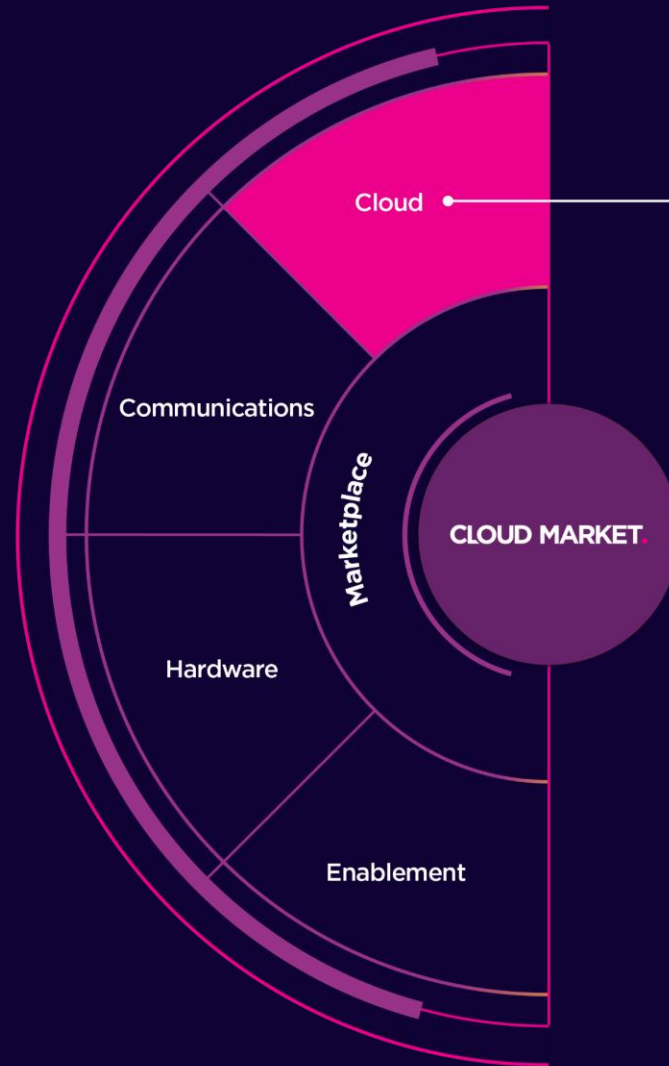
Securely log in to Marketplace, our self-service portal, where you will find everything you need in one place to order and support cloud, comms and hardware products and services, all in a modern digital experience.

Marketplace enables our partners to access a curated suite of leading technology products and services including....



Cloud software as a service - productivity, infrastructure, cyber security and backup products and services from the world's leading providers.

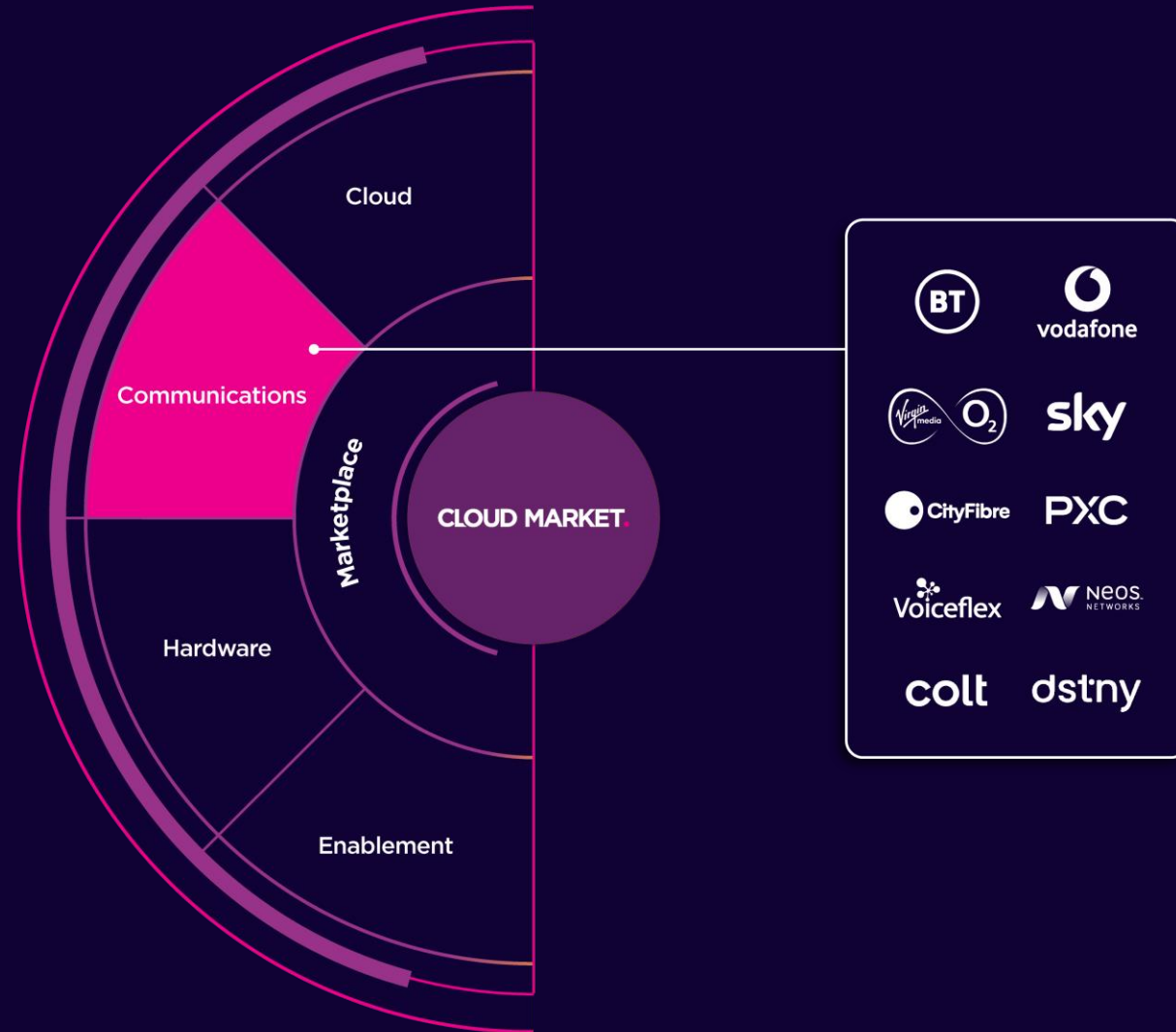
**We are the largest provider of Microsoft CSP Tier 2 licensing to the UK channel.**



Microsoft 365	Microsoft Azure
Copilot	Microsoft Teams
Barracuda.	Acronis
Dropsuite	Bitdefender
Exclaimer	vade
skykick	WEBROOT Smarter Cybersecurity
usecure	Gamma
CloudBolt software	BitTitan Acronis, Inc. Company
TitanHQ	

Connectivity, mobile and UC&C products and services from the UK's major carriers and operators.

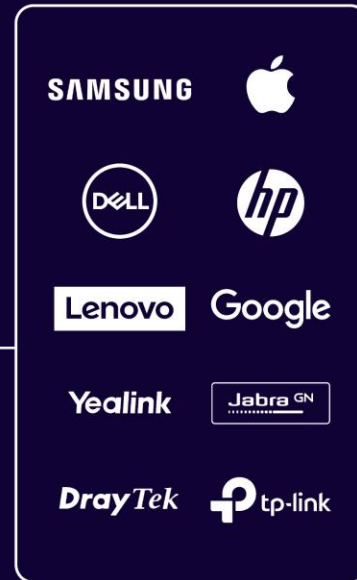
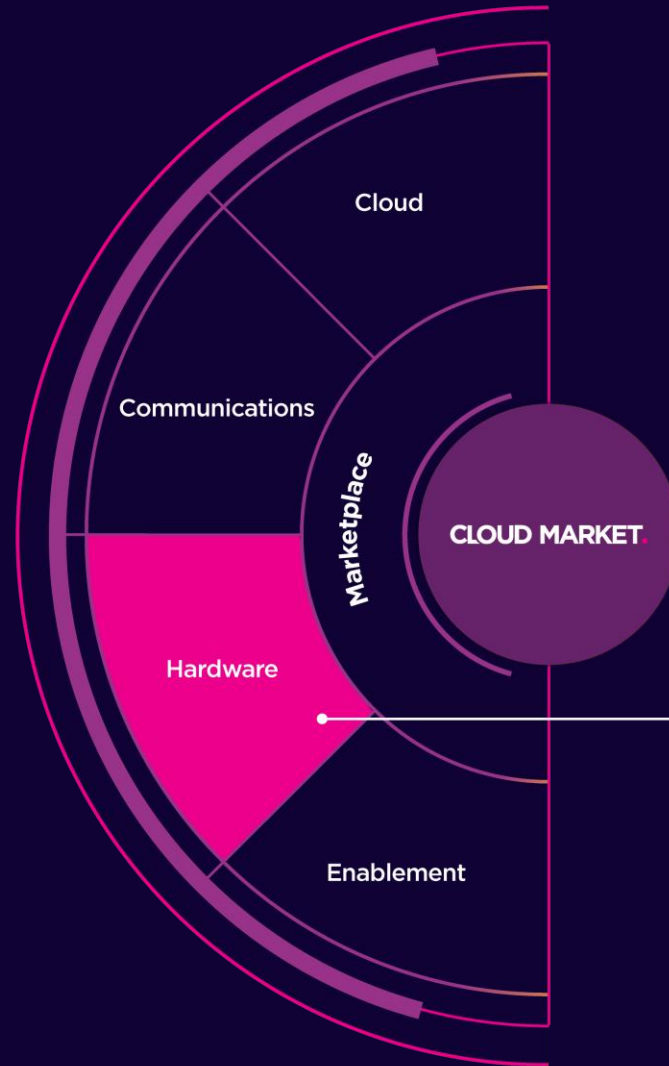
**We are the largest provider of wholesale connectivity and mobile services to the UK channel.**



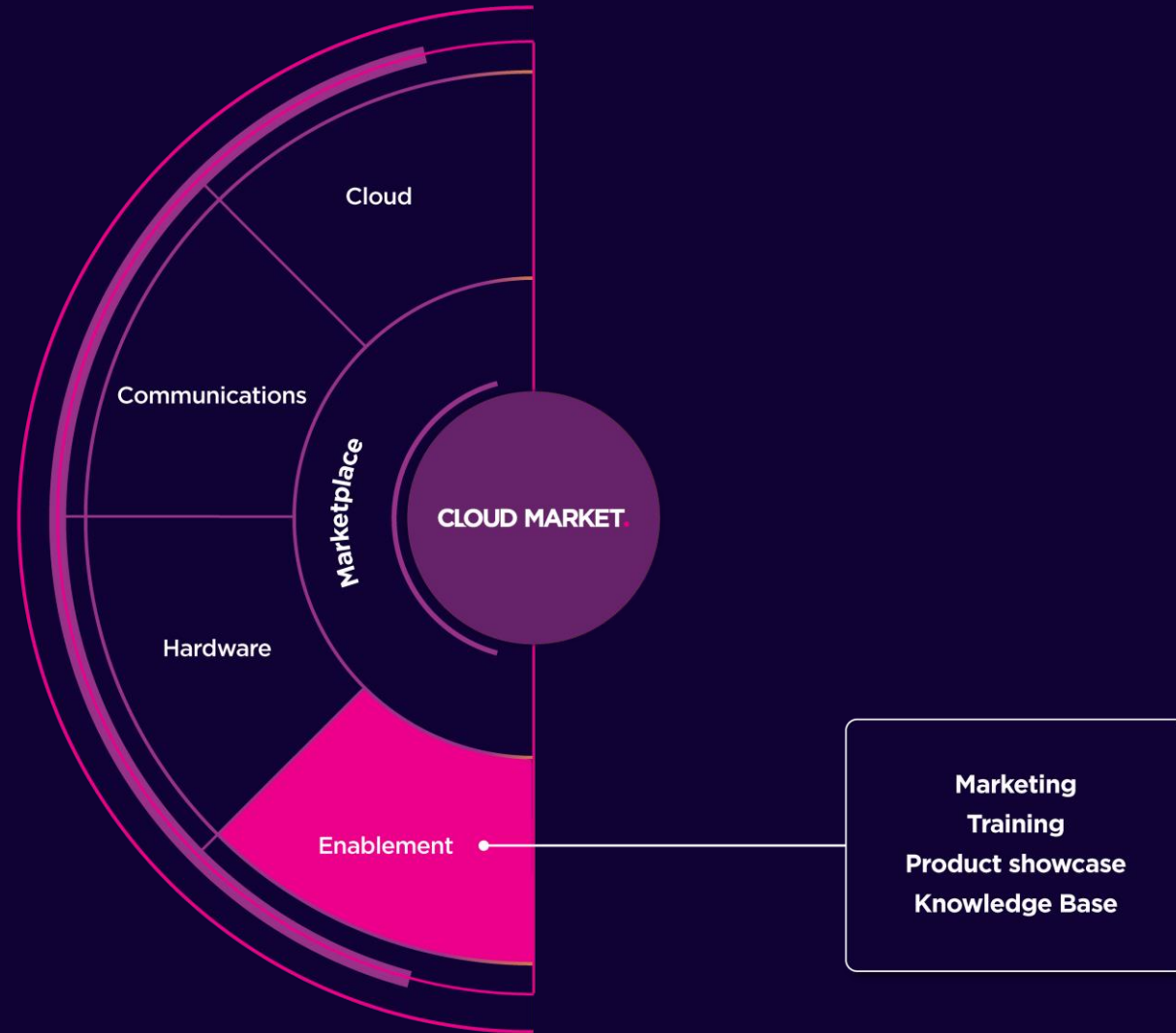
Hardware solutions from the world's leading tech brands.

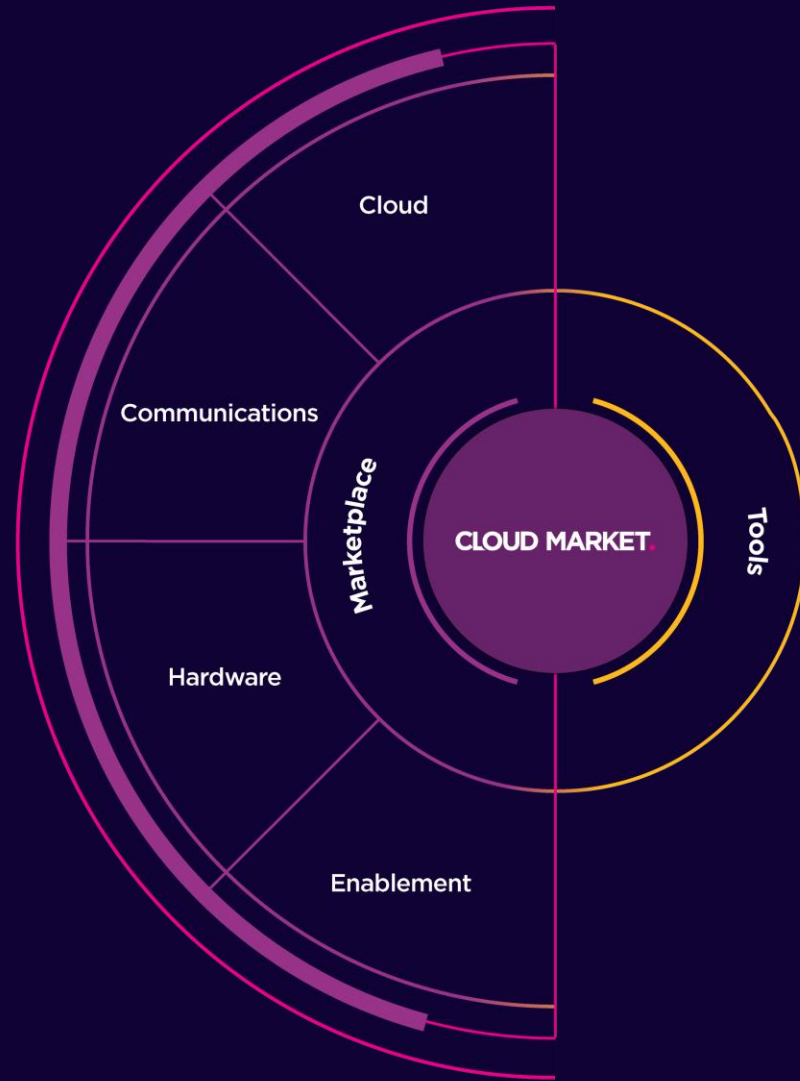
**Benefit from Giacom's buying power to access competitive pricing, with availability sourced from the UK's leading hardware distributors.**

**Pay on account or as a service with a tech subscription**



Marketplace also contains a product showcase, a comprehensive knowledge base, and enablement tools - assets that help our partners to learn about, build, train and successfully market, sell and support new products and services, gain deeper expertise and grow their business

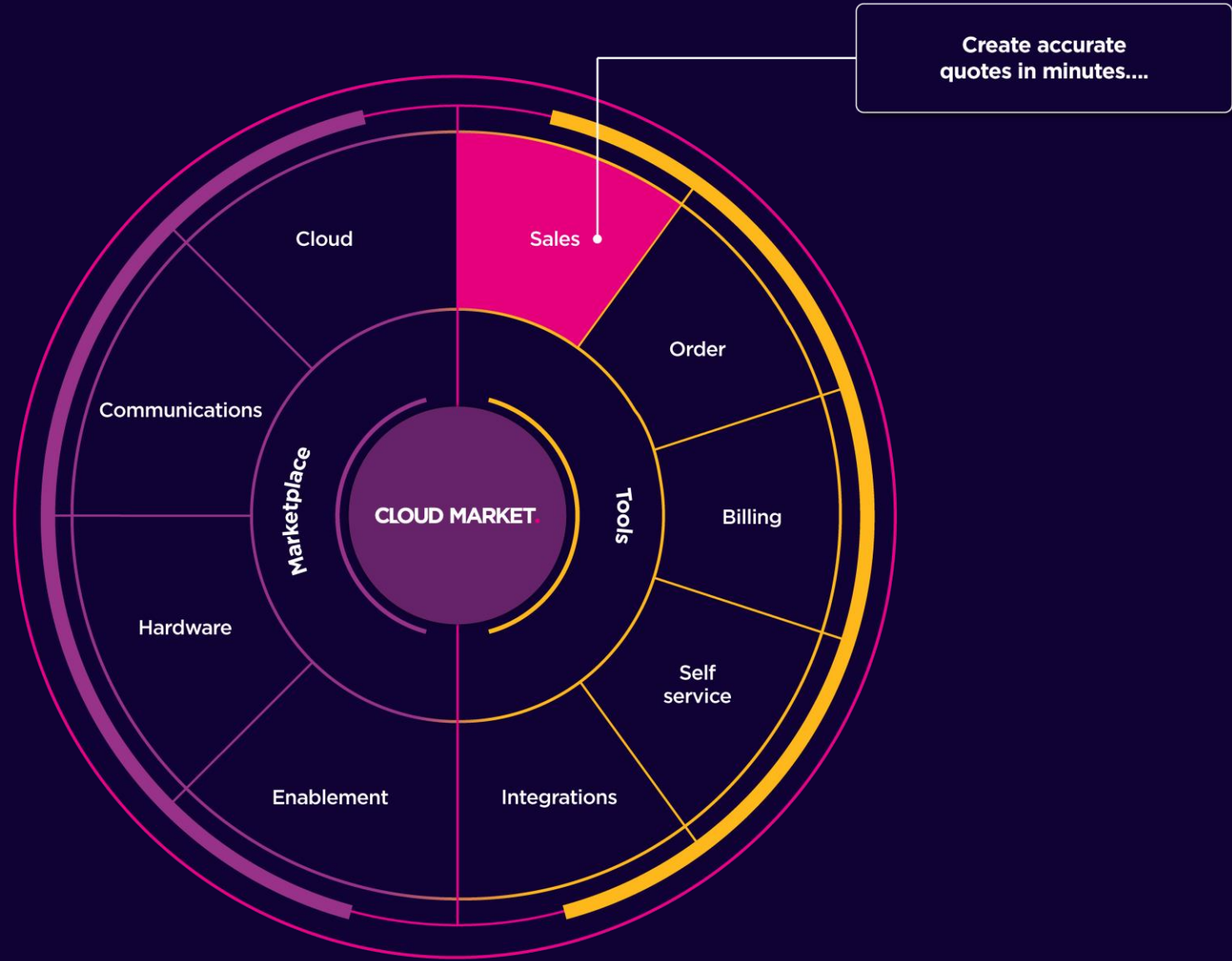




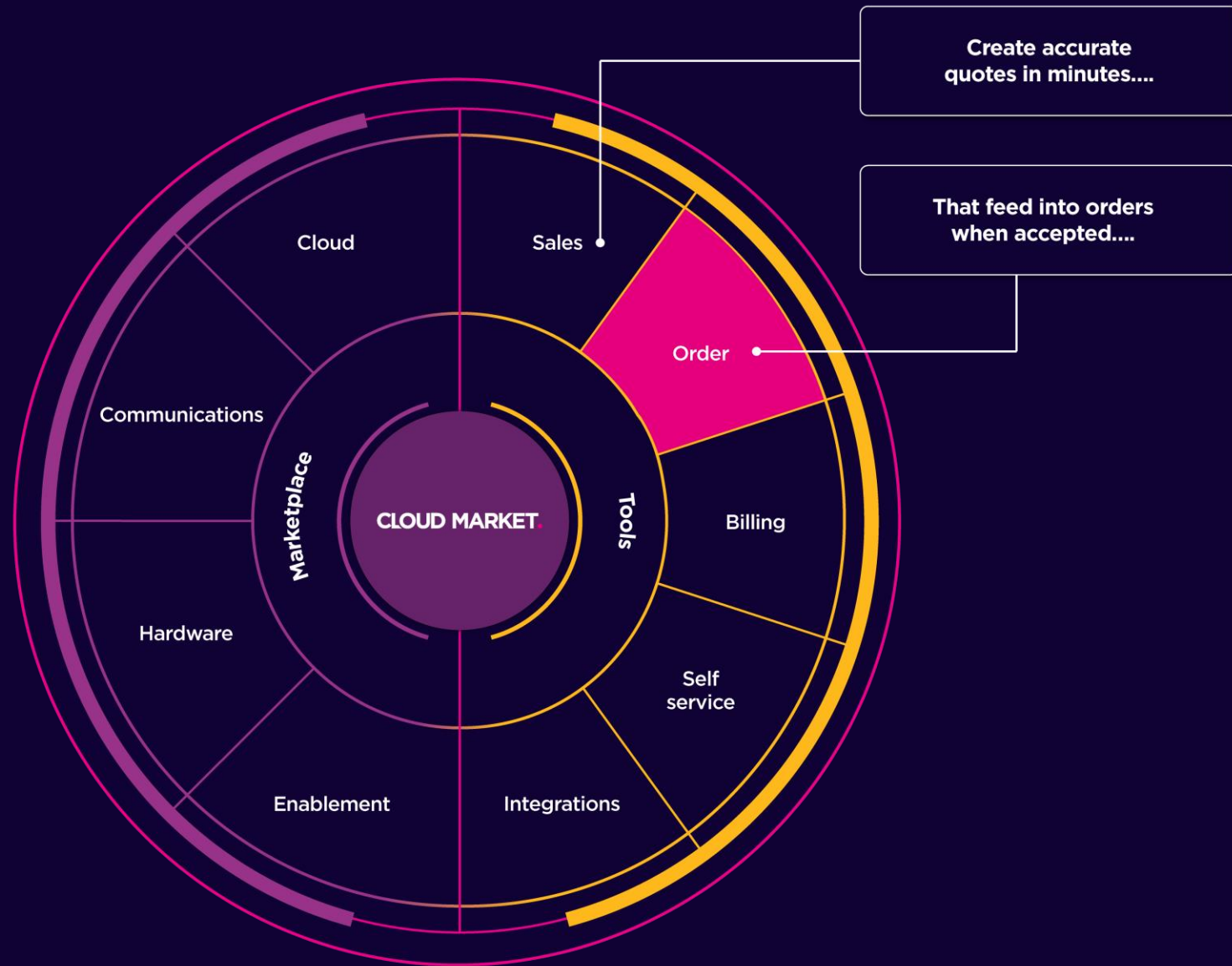
## Supercharge your business with Cloud Market Tools

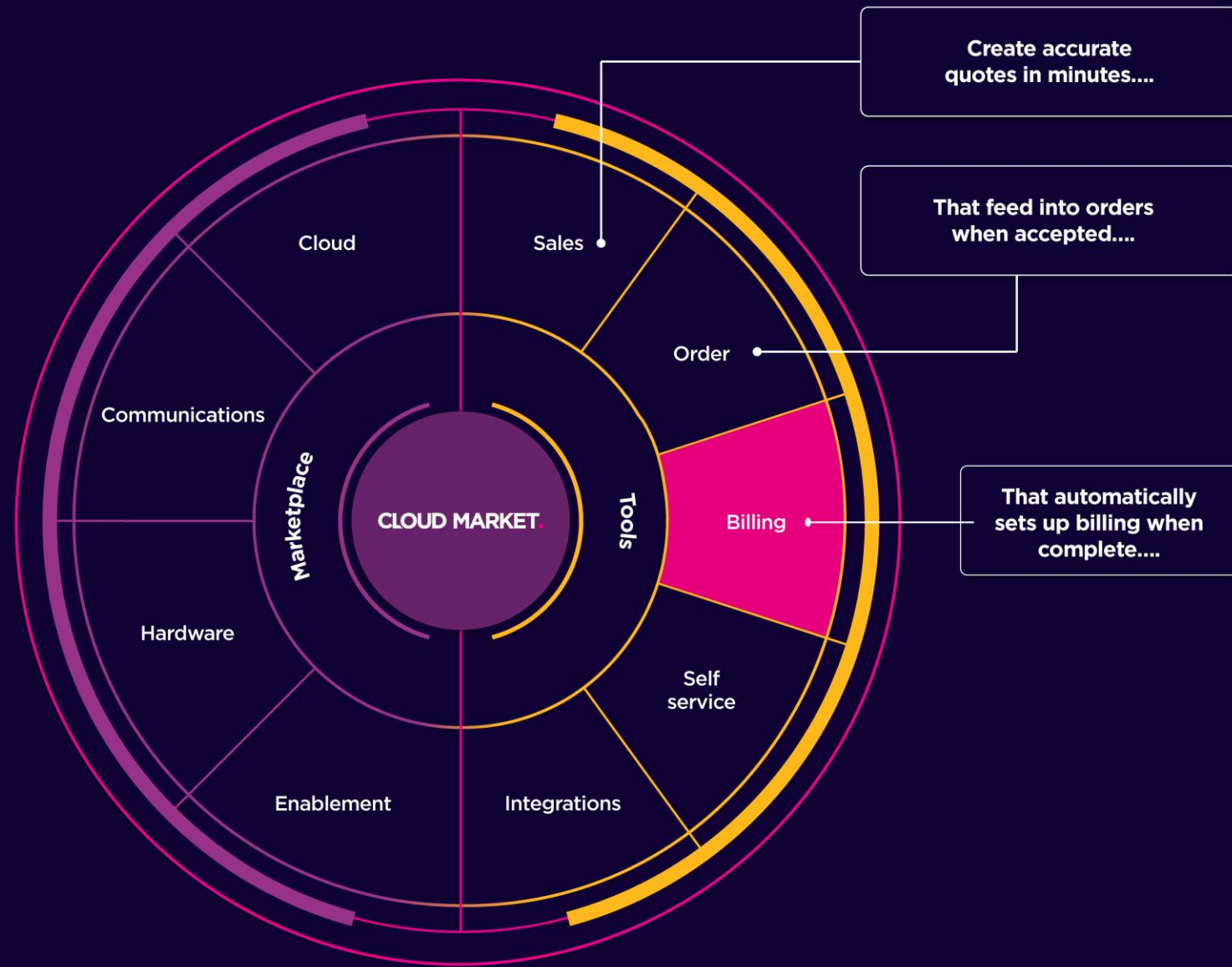
We appreciate Giacom products make up only part of the solutions you build for your customers. This is why we have created Cloud Market Tools.

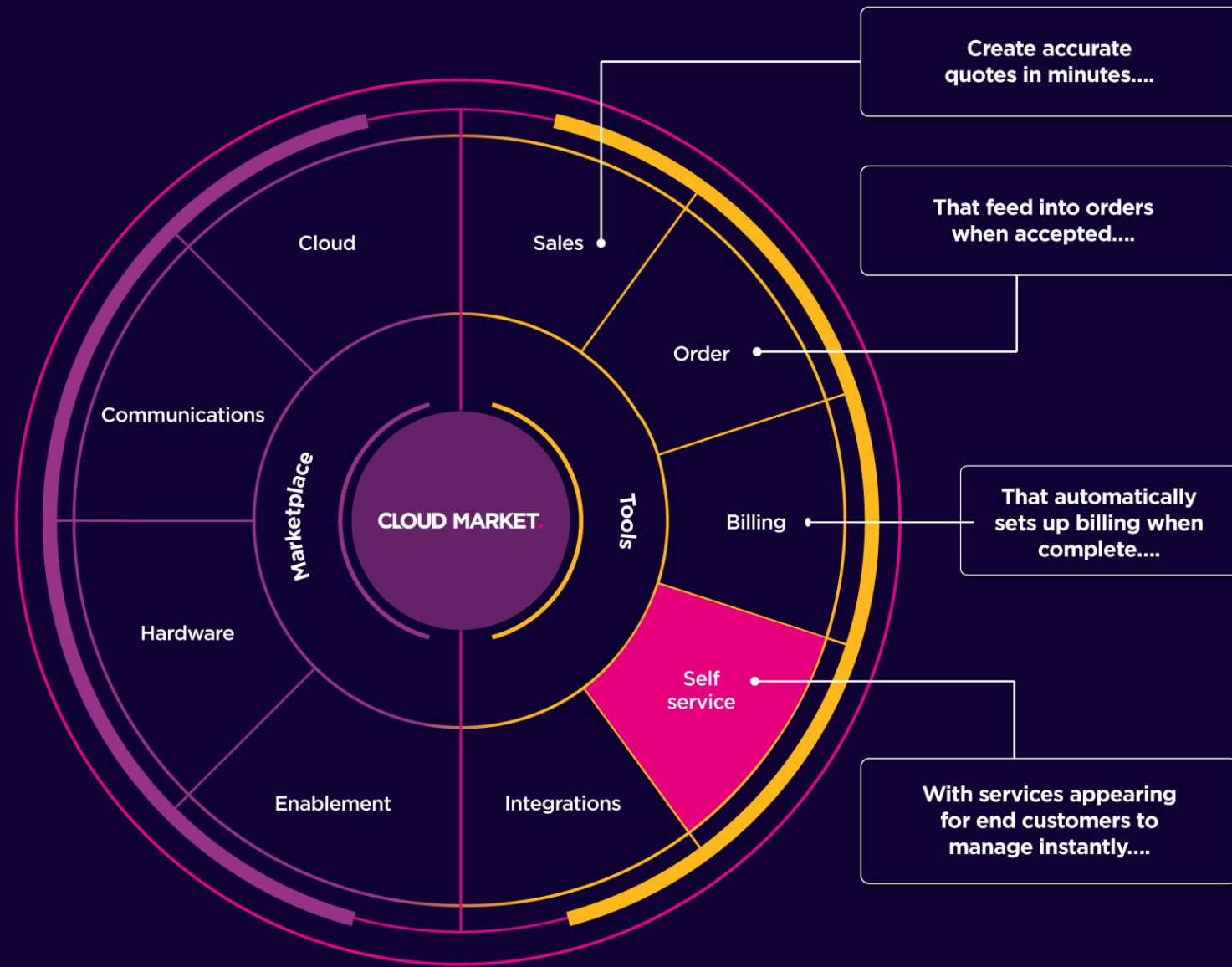
**Cloud Market Tools sit at the heart of your business operations, providing a complete solution to streamline your quote to cash process; enabling teams, improving efficiency and levelling-up customer experience.**

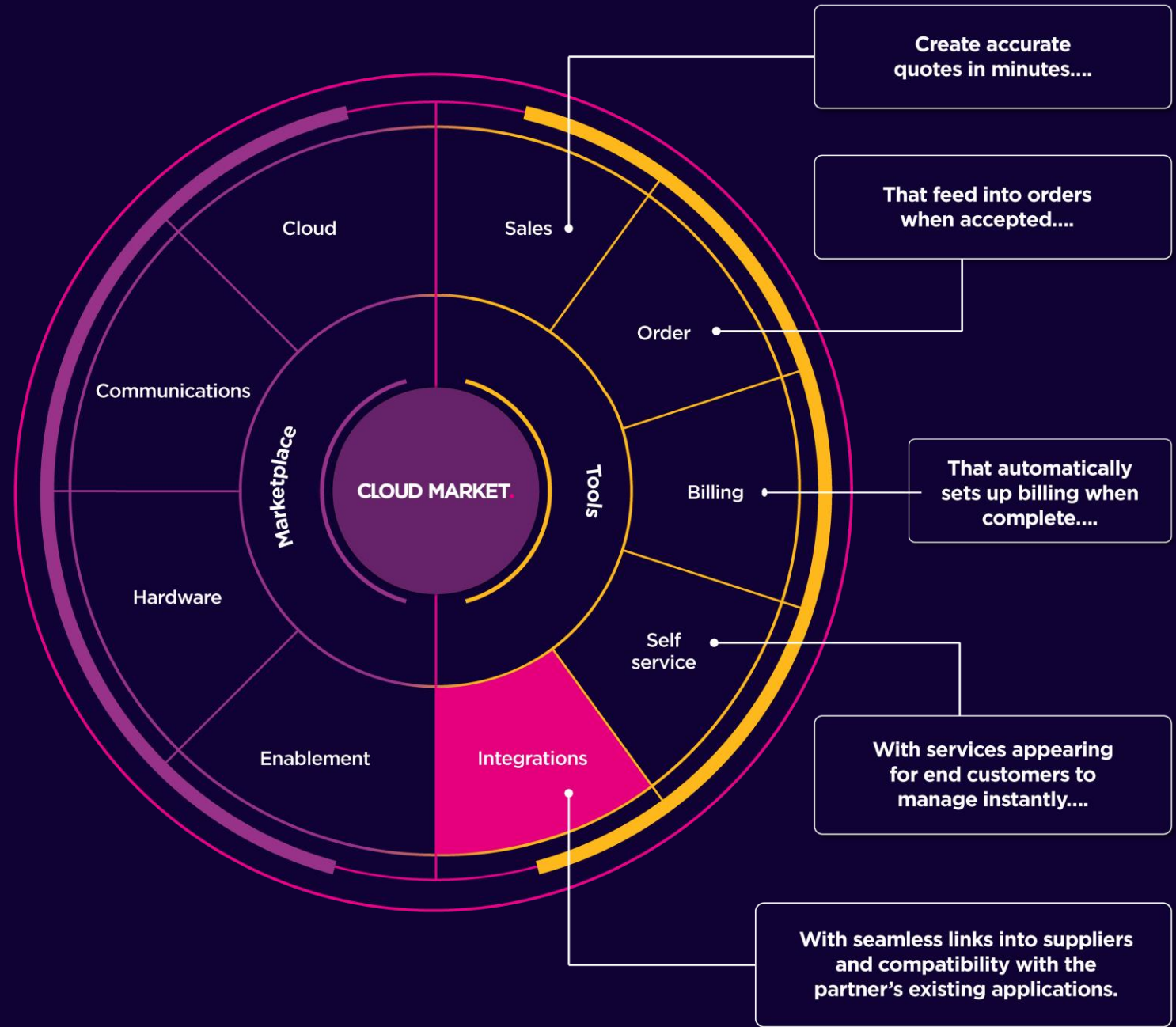


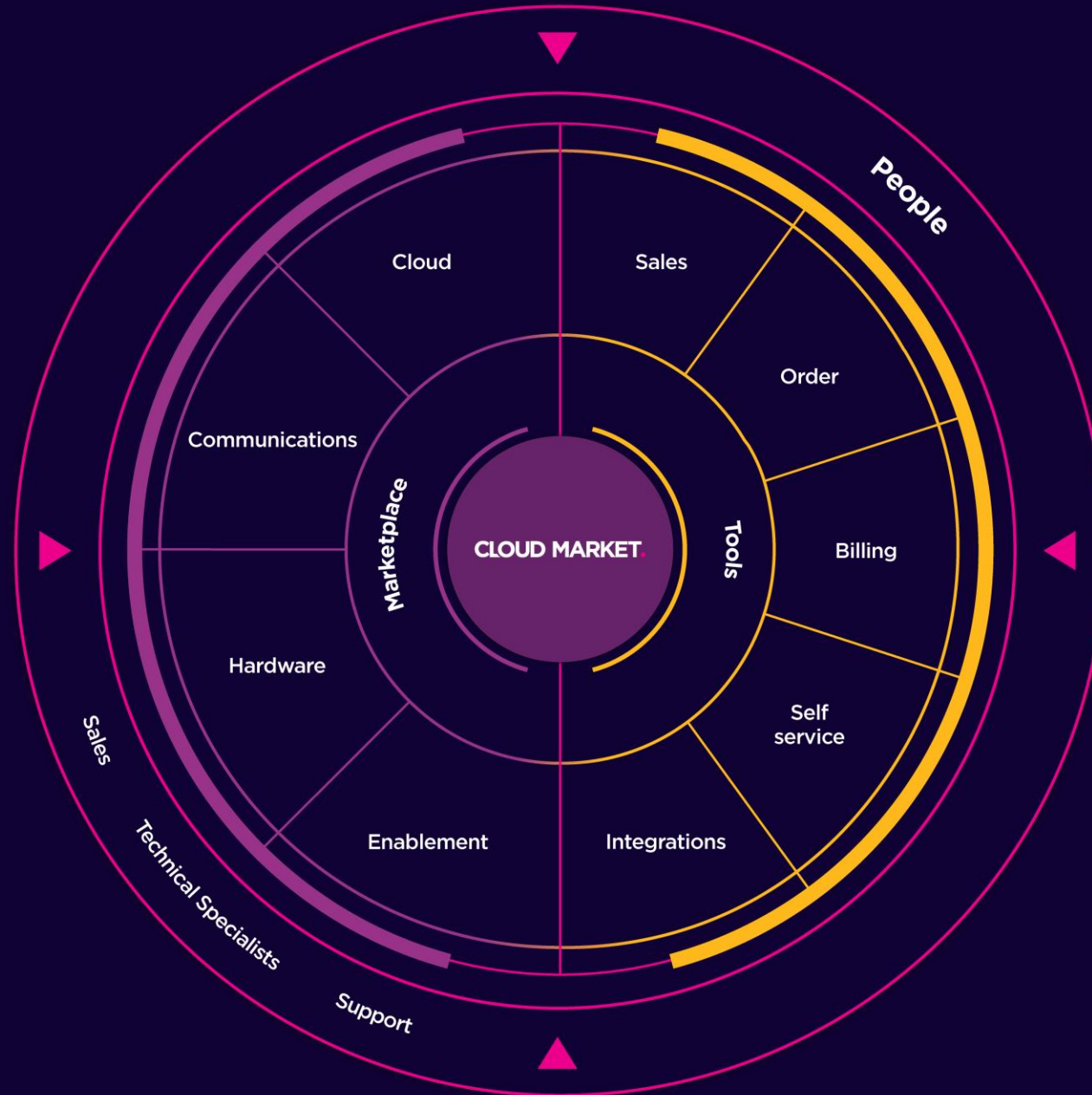












At Giacom, we aren't just a faceless technology platform. We pride ourselves on being the best people to do business with.

We provide comprehensive expertise behind every product in Cloud Market, from account management and marketing, to technical specialists, to operational support, ensuring we are there to help our partners build the breadth and depth of capability they need to serve their customers.



Imagine

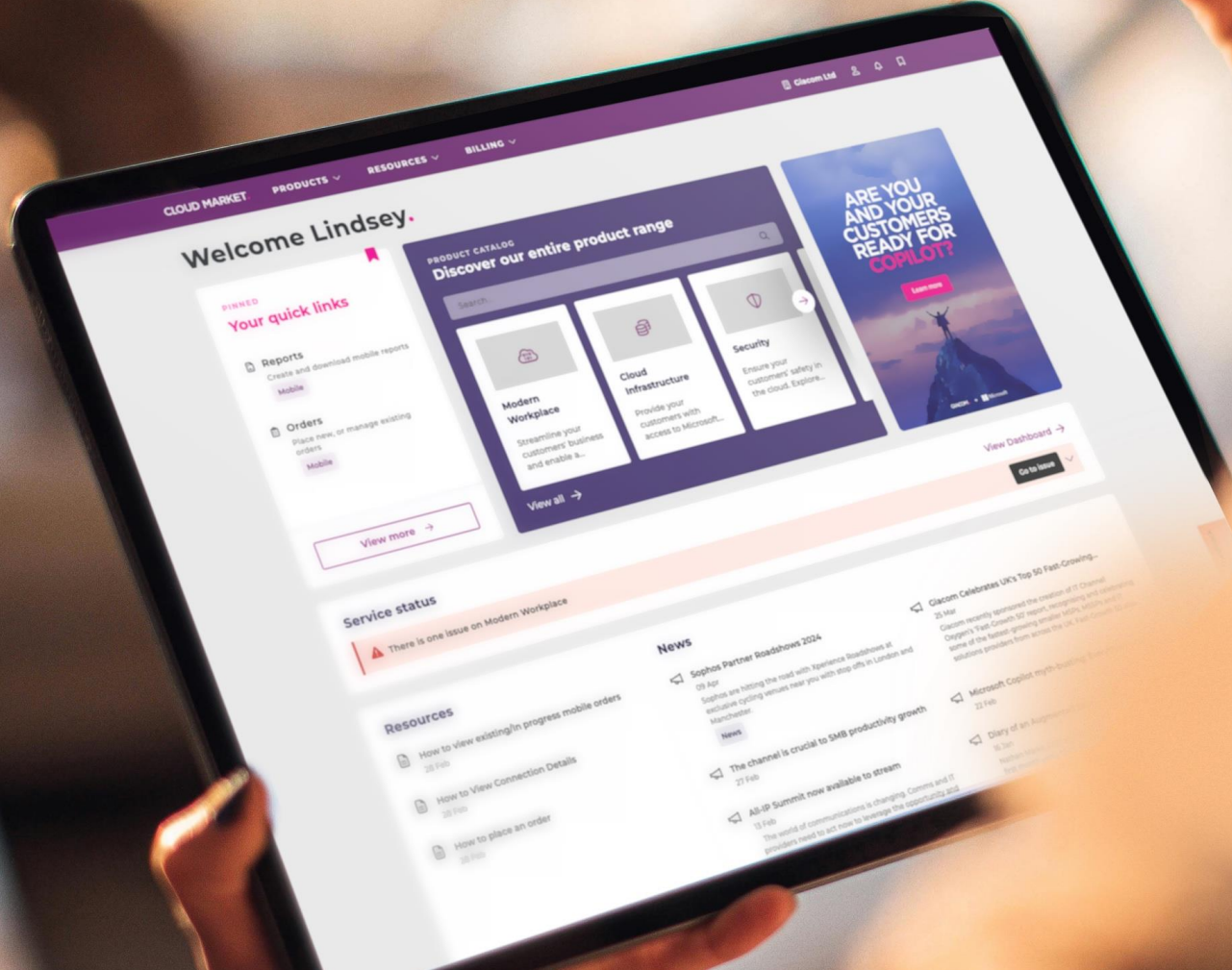
what we can  
do together

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A high-angle, rear-view photograph of three runners on a purple track with white lane markings. The runner in the foreground is wearing a light orange tank top and black shorts. The middle runner is wearing a teal shirt and blue shorts with a white number '6' on the back. The runner in the distance is wearing a dark blue singlet and shorts. The background shows the curved lines of the track receding into the distance.

Helping you  
drive EBITDA  
growth?

GIACOM.



**CLOUD MARKET.**  
marketplace



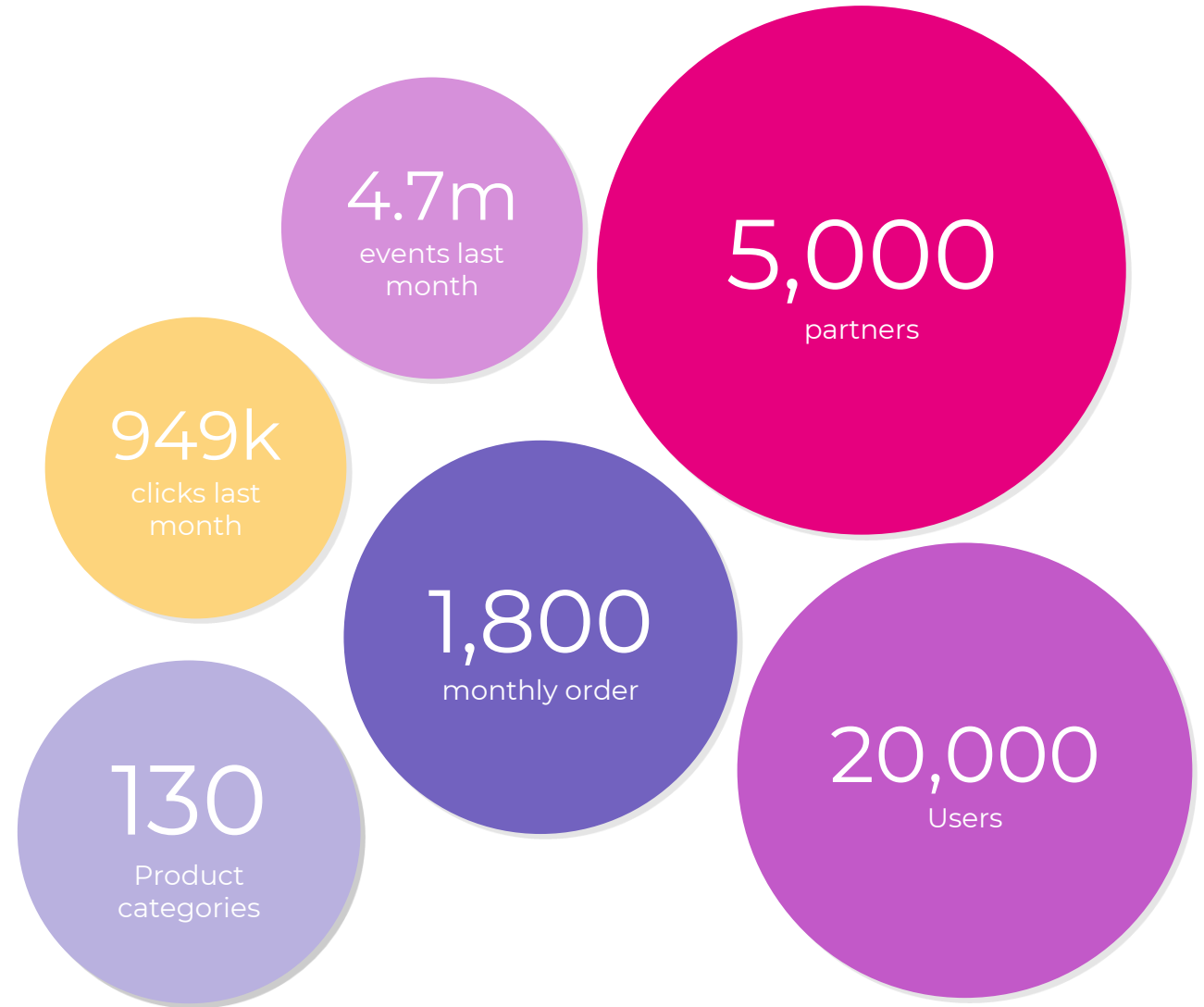
# CLOUD MARKET.

marketplace

## Mission

Cloud Market Marketplace provides resellers and MSPs with the best digital experience when selecting technology solutions for their customers.

Marketplace removes the friction between MSPs and technology solutions from leading vendors & carriers.



# Everything MSPs Need For Managing Wholesale Ordering and Provisioning



## Marketplace

Order Comms, Cloud & Hardware products through a centralised platform



## Product catalogue

Browse over 1500 products & services to make informed purchasing choices



## Provision

Automated provisioning with vendors & real-time tracking



## Billing & invoicing

Access & download Bills, CDR/SDR's & invoices



## Enablement

Tools, resources, and support to empower sales teams



## Knowledgebase

A centralised repository of information & resources



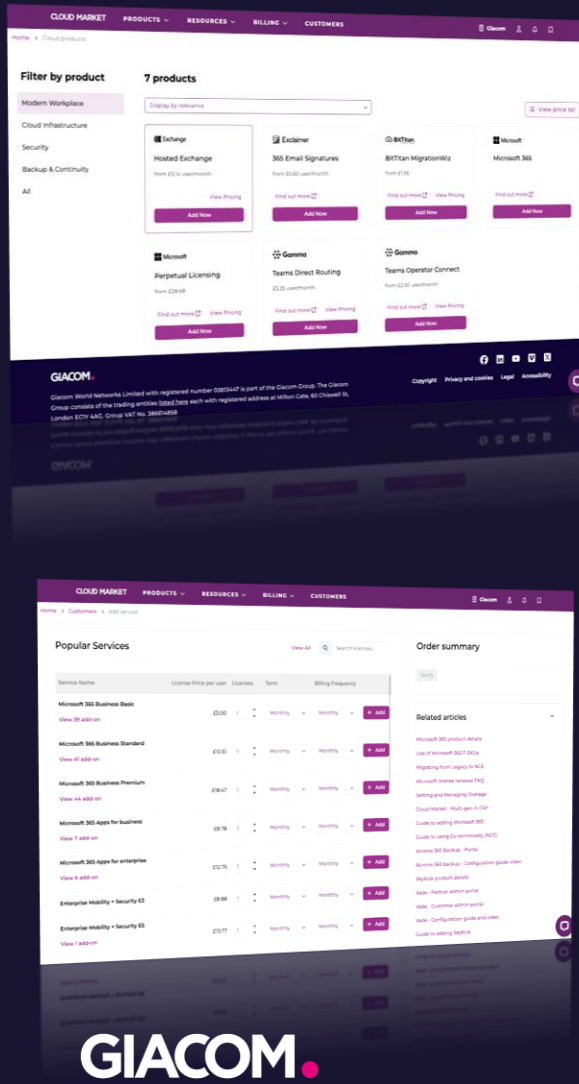
## Asset Management

Manage assets for all products and services throughout their lifecycle



## Reports & insights

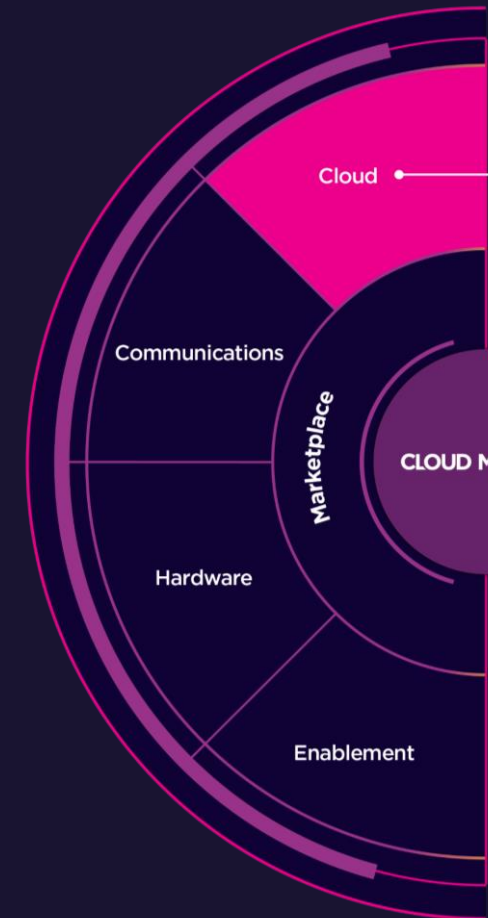
Comprehensive analytics and data visualisation tools, offering valuable insights and trends



# Cloud

## Automate, Simplify and Centralise Your Cloud Management

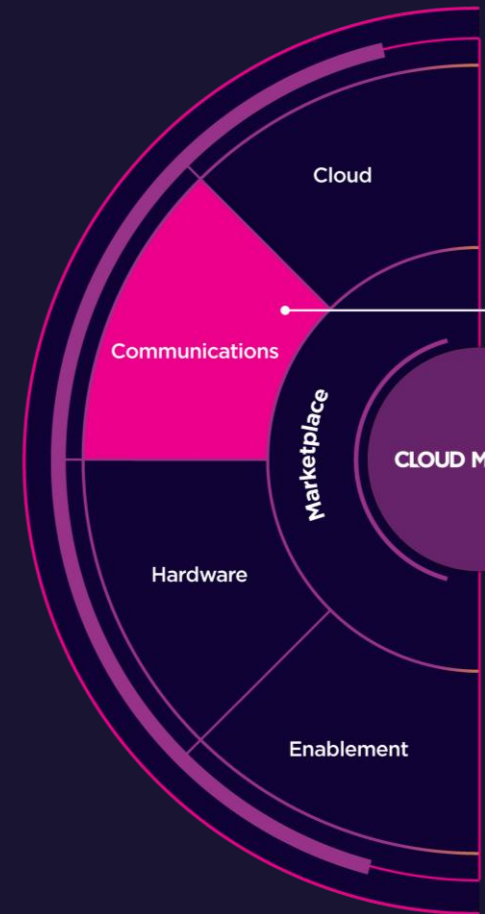
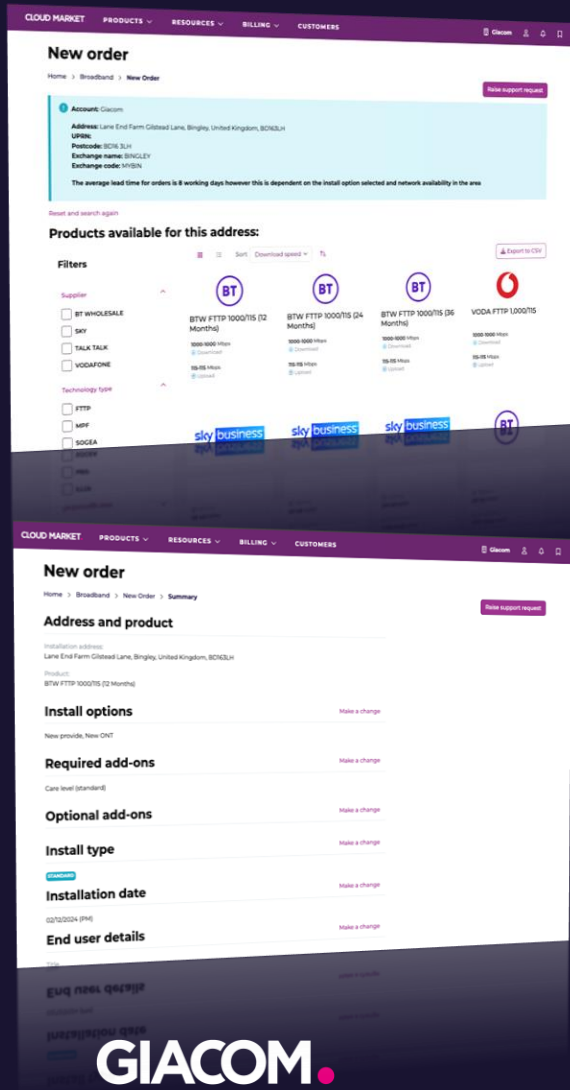
- Simplified **ordering and management** of NCE subscriptions with streamlined processes.
- Centralised **cloud provisioning and service management dashboard** offering a comprehensive view of all subscriptions, licenses, and usage in one place.
- Automated application of **vendor promotions** to maximise **partner savings** effortlessly.
- Integration with **leading PSA applications** to enhance workflow efficiency.



# Communications

Drive revenue growth through our extensive Mobile, Connectivity and Voice portfolio

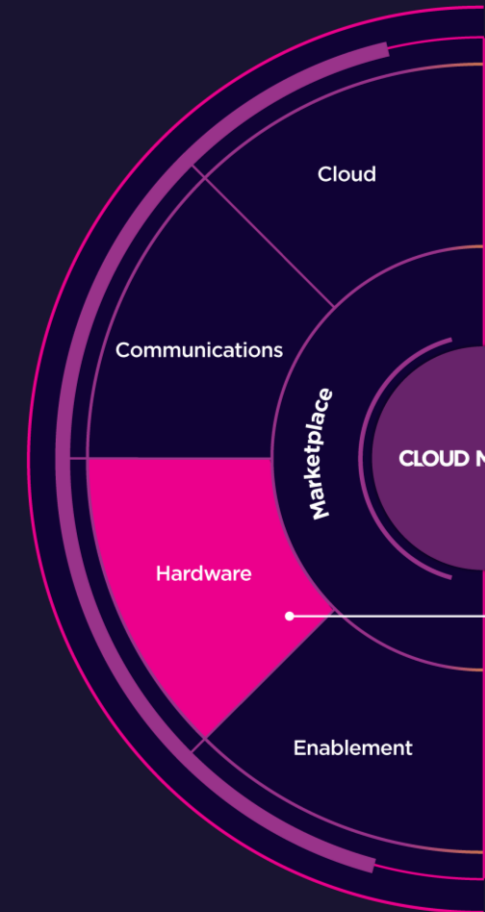
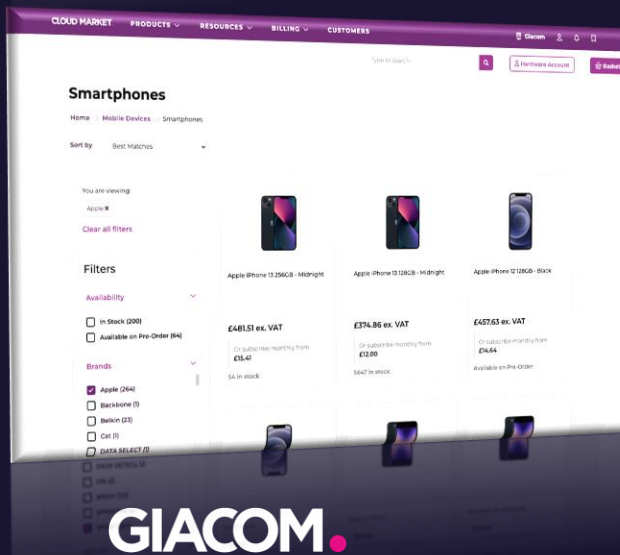
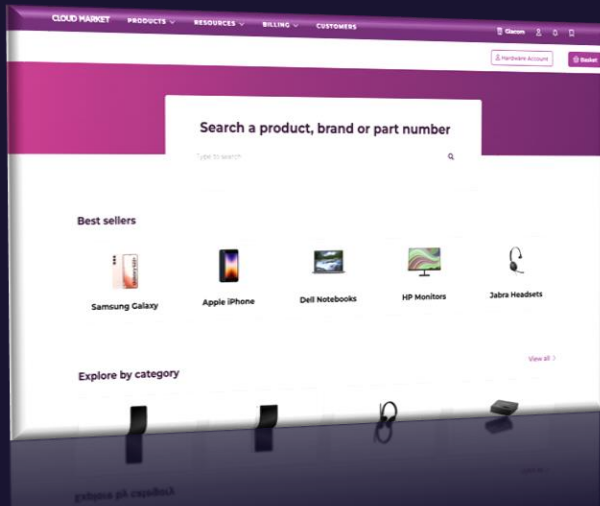
- Simple and quick automated order journeys making it easy to do business with your customers.
- Automated billing processes ensure efficiency and accuracy.
- Support your customers 24/7 to perform a wide range of self-management and reporting activities.



# Hardware

Access to latest hardware from the biggest brands.

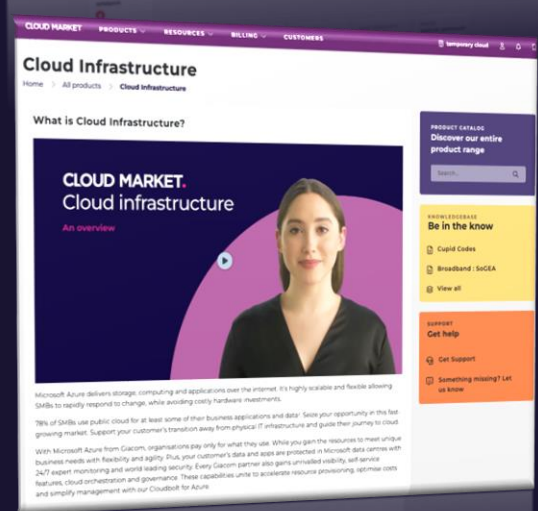
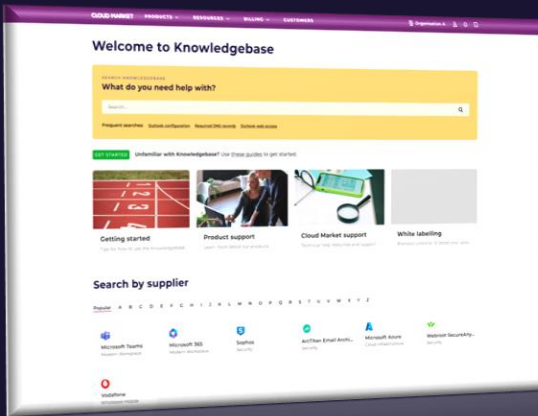
- Exclusive access to **thousands of hardware products** from over 100 top tech brands.
- With the ability to quote and utilise **lease options, buy on account** or sell on a **monthly subscription** basis.
- Leverage the buying power of Giacom to **save costs** and **increase profits**.
- Build a loyal customer base and develop a **regular revenue stream**.



# Enablement

## Empower Your Team with Marketplace Enablement Features

- Comprehensive product and services catalogue enhanced with AI-generated videos for in-depth understanding.
- Extensive knowledge base with troubleshooting articles and solutions for quick issue resolution.
- Interactive training materials that enhance product understanding and practical application.
- Showcase examples and product demos to build partner confidence and demonstrate real-world applications.



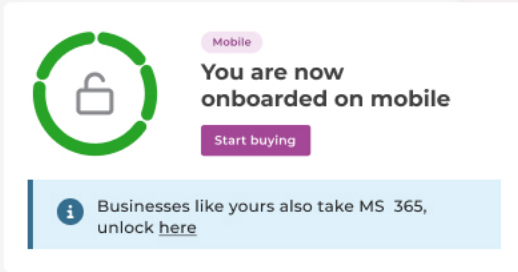
# CLOUD MARKET. Marketplace

Key features and functionality



## Digitised onboarding

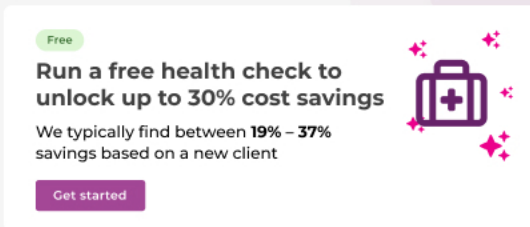
Onboard new products and services with minimal effort, empowering you to start selling and generating revenue faster.



A notification card with a green lock icon in a circle. The text reads: "Mobile You are now onboarded on mobile Start buying". Below this, a light blue box contains an information icon and the text: "Businesses like yours also take MS 365, unlock here".

## Insights and reporting

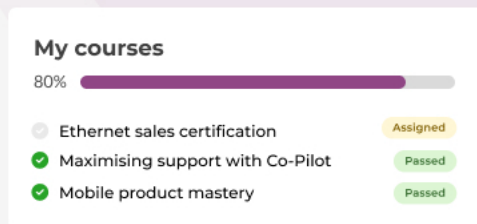
Access actionable insights to easily identify cost-saving opportunities and improve overall business efficiency.



A notification card with a green "Free" tag and a purple first aid kit icon. The text reads: "Run a free health check to unlock up to 30% cost savings. We typically find between 19% - 37% savings based on a new client. Get started".

## Learning hub

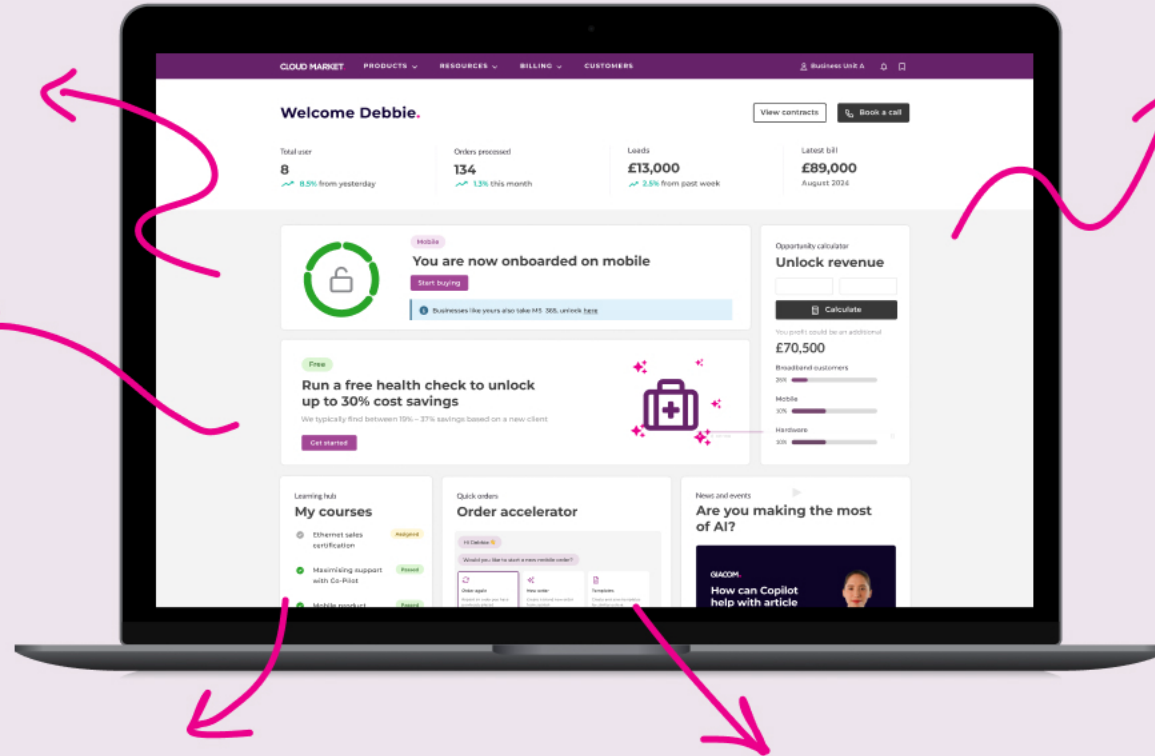
Training resources that empower your team to become proficient in product usage, increasing confidence in supporting your customers thus enhancing sales outcomes.



A card titled "My courses" with an 80% progress bar. It lists three courses: "Ethernet sales certification" (Assigned), "Maximising support with Co-Pilot" (Passed), and "Mobile product mastery" (Passed).

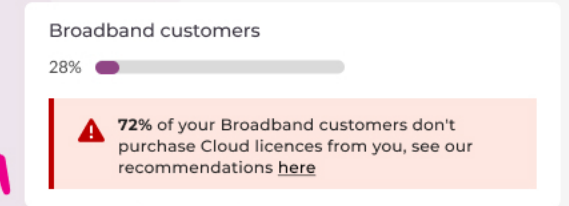
## CLOUD MARKET.

# Unlock Business Growth through Marketplace



## Customisable dashboards

Gain comprehensive insights tailored to your specific business needs, helping you make data-driven decisions, monitor performance, and identify new opportunities.



A card titled "Broadband customers" with a 28% progress bar. A warning icon and text state: "72% of your Broadband customers don't purchase Cloud licences from you, see our recommendations here".

## News and events

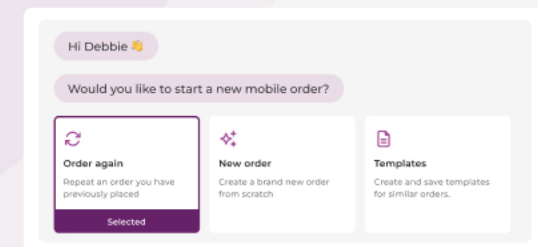
Stay updated with industry trends and product news to respond proactively and seize new opportunities.



A video player showing a GIACOM video titled "How can Copilot help with article generation" featuring a woman in a blue shirt.

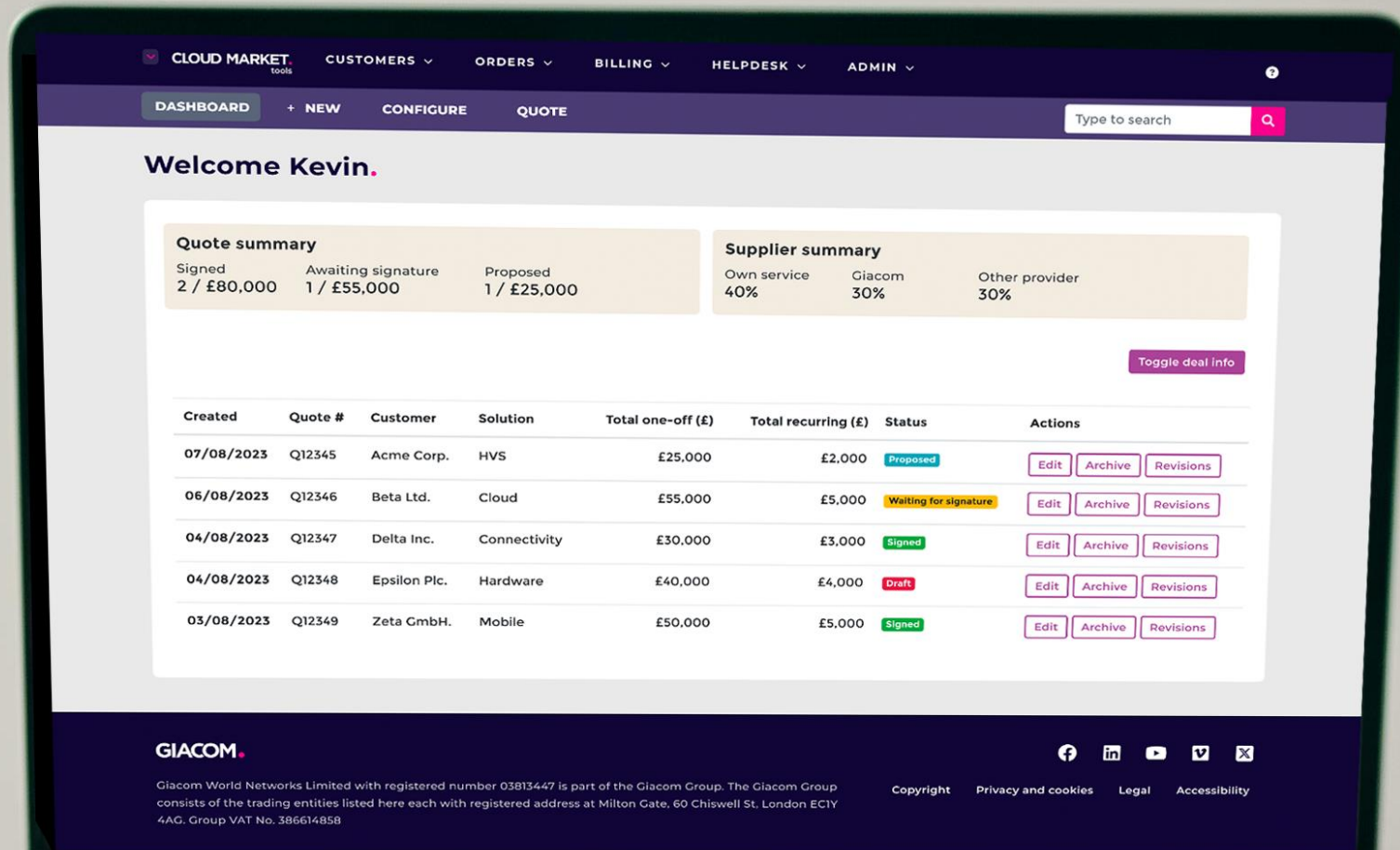
## Order accelerator

Save time with easy reordering and custom order templates that make transitions to new product sets and purchases quick and efficient.



A card titled "Order accelerator" with a "Hi Debbie" greeting. It asks "Would you like to start a new mobile order?" and offers three options: "Order again" (Selected), "New order", and "Templates".





Welcome Kevin.

Quote summary

Signed 2 / £80,000 Awaiting signature 1 / £55,000 Proposed 1 / £25,000

Supplier summary

Own service 40% Giacom 30% Other provider 30%

Toggle deal info

Created	Quote #	Customer	Solution	Total one-off (£)	Total recurring (£)	Status	Actions
07/08/2023	Q12345	Acme Corp.	HVS	£25,000	£2,000	Proposed	Edit Archive Revisions
06/08/2023	Q12346	Beta Ltd.	Cloud	£55,000	£5,000	Waiting for signature	Edit Archive Revisions
04/08/2023	Q12347	Delta Inc.	Connectivity	£30,000	£3,000	Signed	Edit Archive Revisions
04/08/2023	Q12348	Epsilon Plc.	Hardware	£40,000	£4,000	Draft	Edit Archive Revisions
03/08/2023	Q12349	Zeta GmbH.	Mobile	£50,000	£5,000	Signed	Edit Archive Revisions

GIACOM

Giacom World Networks Limited with registered number 03813447 is part of the Giacom Group. The Giacom Group consists of the trading entities listed here each with registered address at Milton Gate, 60 Chiswell St, London EC1Y 4AG. Group VAT No. 386614858



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CLOUD MARKET tools

# Supercharge your business with Cloud Market Tools

We want to help you increase your enterprise value.

Buying  
better

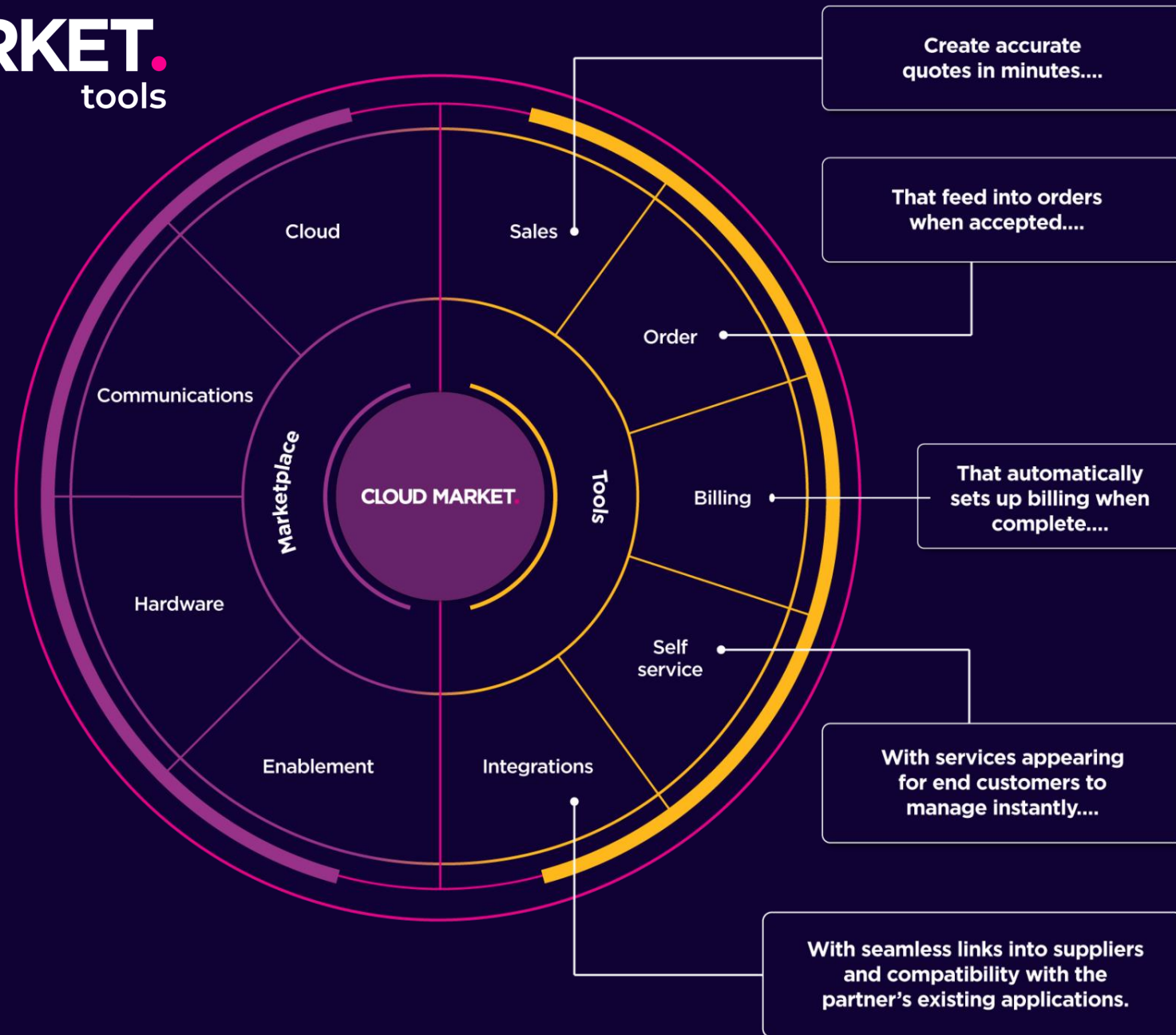
Selling  
better

Operating  
better

Retaining  
better

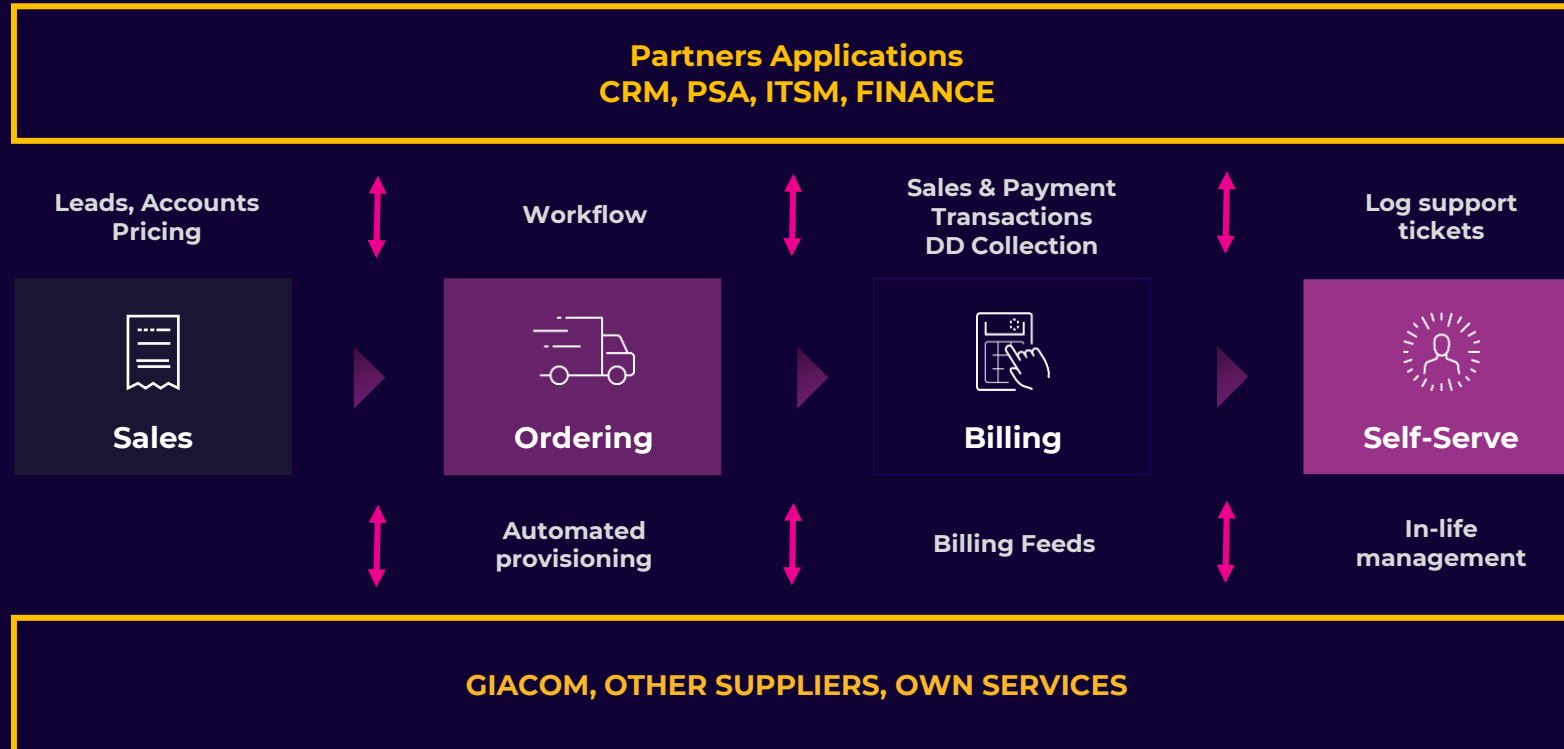
# CLOUD MARKET.

tools



# How it works

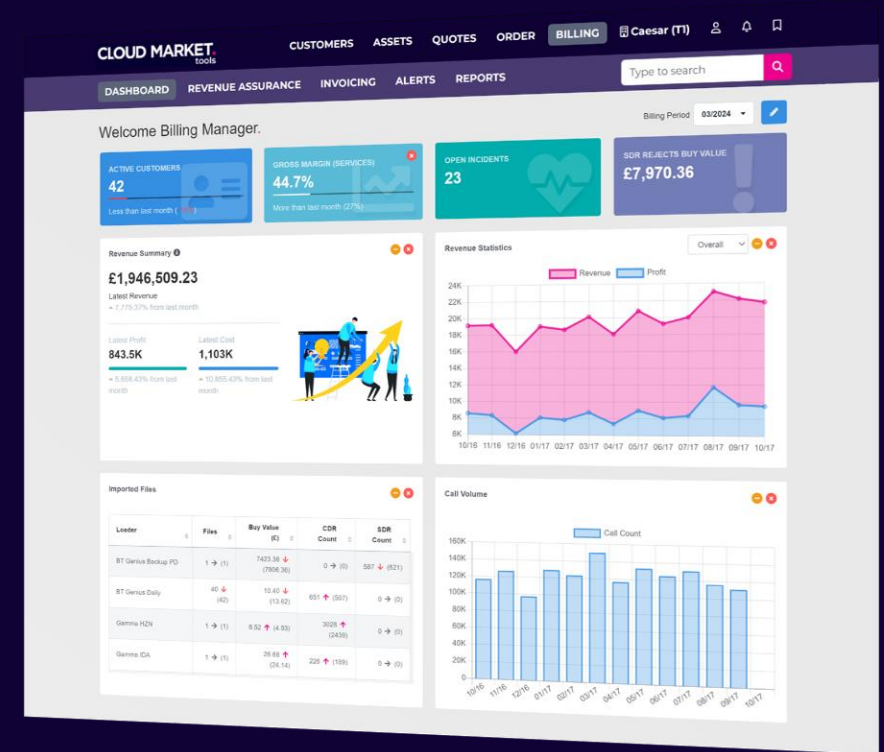
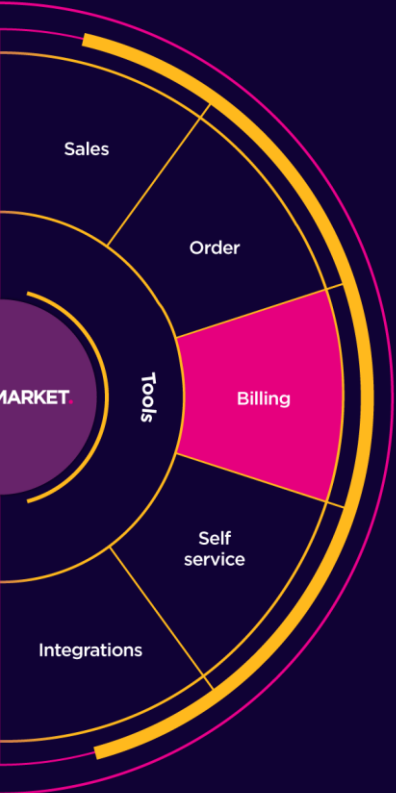
Seamless connections for effortless automation and data integrity



# Billing

Supercharge your billing processes, enhancing their efficiency and accuracy.

- Over **1000 billing partners** using our platform
- Manage all your cloud services, subscriptions and costs in a **centralised system**
- **Automated markups and service costing** simplifies the process of adding service fees to cloud products
- Produce clean, **consolidated invoices** that are easy for end clients to understand



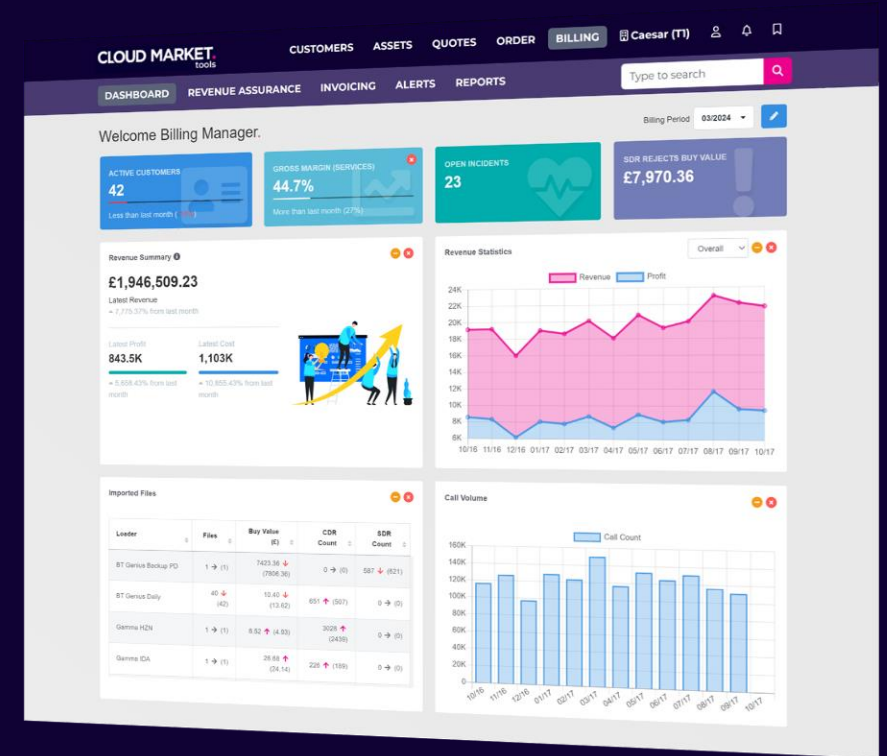
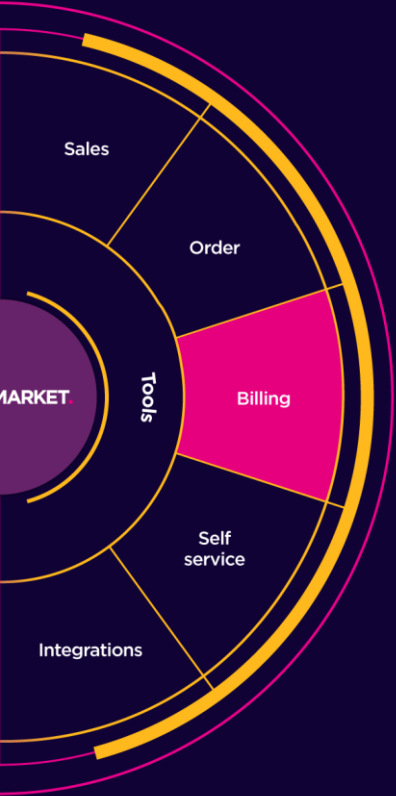
## Optimised processes around

- Lengthy reconciliation procedures (automate importing of supplier billing and usage feeds)
- Distribution of customer SDR invoicing and reports
- Posting transactions to Accounts and Payment collection services

# Billing

Supercharge your billing processes, enhancing their efficiency and accuracy.

- Improve cashflow and enhance your customer experience with speedier, more regular bill-runs
- Maximize your margins with powerful BI and dynamic ad-hoc reporting tools, complemented by flexible preconfigured reports
- Managed Service option, Premium Assist gives you all the benefits of our billing platform without adding to your workload

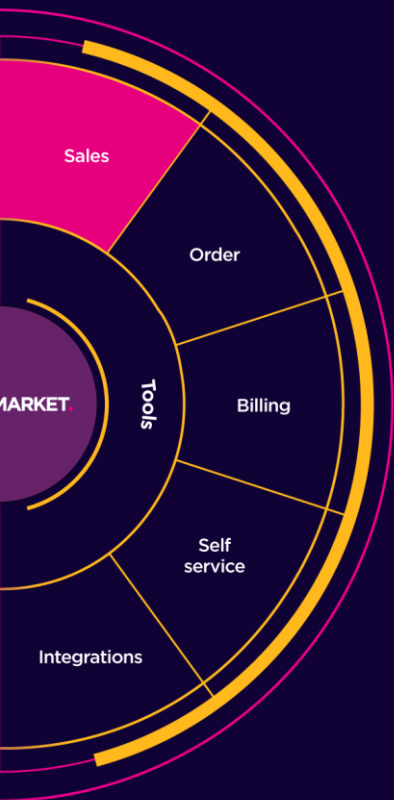


## Optimised processes around

- Lengthy reconciliation procedures (automate importing of supplier billing and usage feeds)
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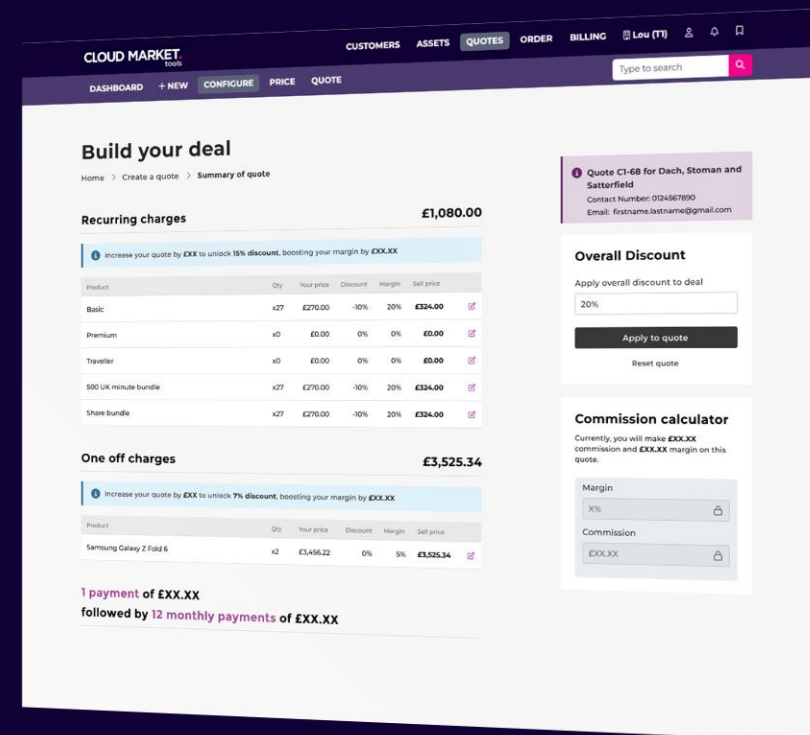
# Sales

Empower your sales team to sell more by enhancing their efficiency and accuracy.



- **Generate quotes in seconds** with accurate pricing drawn from a bespoke product catalogue, and discounts and promotions applied instantly to **win deals on the day**
- **Increase conversation rates** by providing immediate, accurate professional quotes & E-Sign agreements
- Commission calculated immediately to provide a **real-time view of the deal margin** and what it means for their sales numbers
- Dashboards at individual and team level provide real-time monitoring of sales targets and performance

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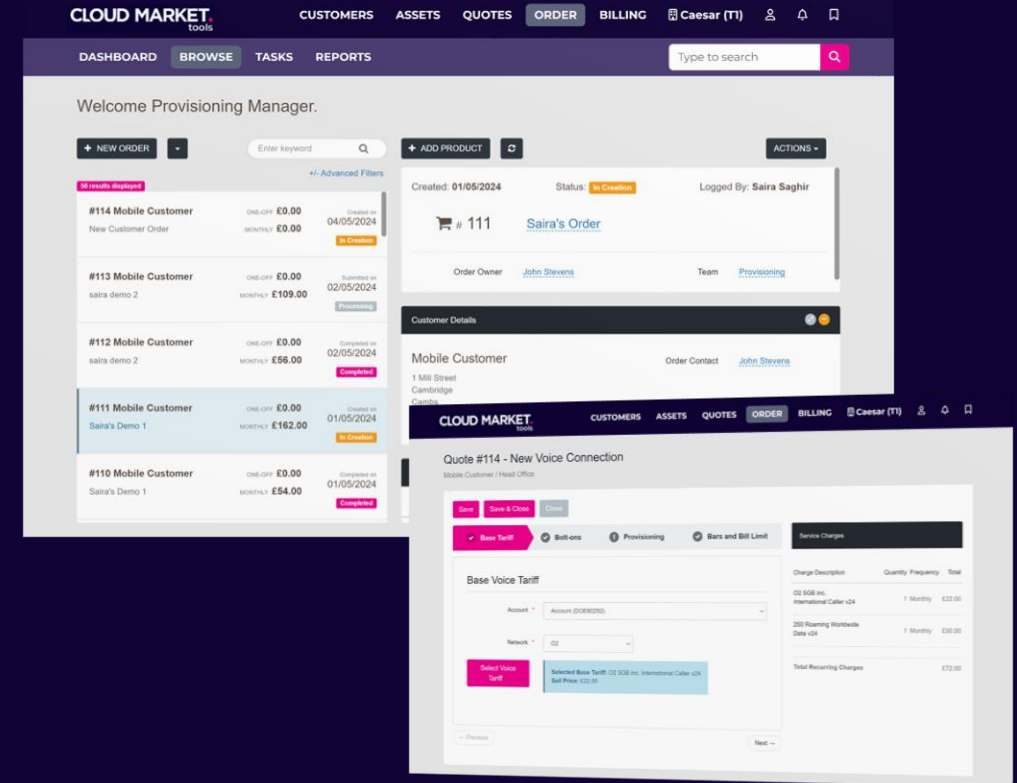
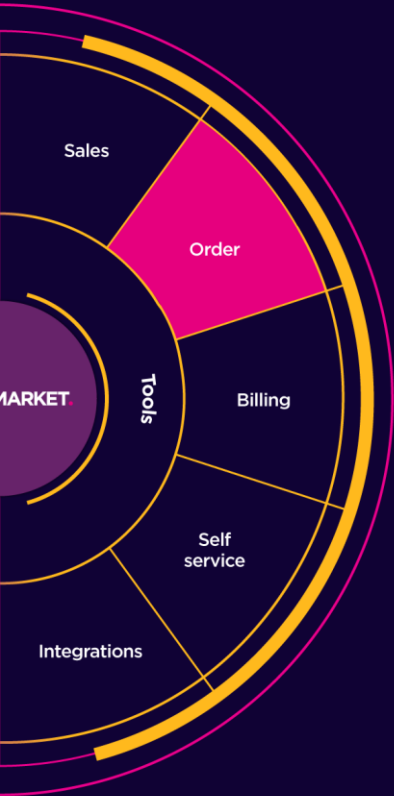
## Optimised processes around

- Quote Creation (typically less than 15 mins)
- Solution sign-off (pre validated solutions require no sign off)
- Commercial Sign off (Pre validated commercial rules)
- E-Sign Agreement (created instantly)

# Orders

Revolutionise your order management processes with seamless automation.

- Manage WIP and eliminate the need to juggle multiple portals by conducting the entire order management process through **a single pane of glass**.
- Robust **integrations** eliminate the need to re-key information, minimizing human error and provide **real-time updates**, ensuring you stay informed throughout the process.
- Automated billing upon order completion helps avoid incorrect charges and billing discrepancies, enhancing customer satisfaction.



## Optimised processes around

- Managing WIP (everything in one place)
- Customer and Sales notifications (reducing inbound questions)
- Immediate supplier order (removing entering order into supplier portals)
- Live Supplier updates (no need to constantly check supplier portals)



# Self serve

Reduce the cost of providing first class support with customer empowering Self-Serve portal

- Reduce inbound calls and support requests with autonomous management of estate and ready access to key metrics, billing and reporting information
- Level-up your brand, delight customers and boost NPS with clean, intuitive white label design
- Add value to your overall proposition by providing convenient, instant and 24/7 access to your customers most important service needs
- Autonomous In-life management and smaller sales transactions

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UNBILLED  
DECEMBER 2017 TO DECEMBER 2023  
£122,808.37

CALLS £96.20  
CHARGES £102,244.09  
VAT £20,468.06

LAST BILL #2198  
£4.08

Exclusive offer this month  
Find out more >

TOP 10 SPEND BY TELEPHONE NUMBER

BILLING PERIOD: December 2023

SITE REF.	TELEPHONE NUMBER	SERVICE CHARGES	CALL CHARGES	DURATION	DATA USAGE	TOTAL
ALLO01	07458025308	£100.00	£0.00	0h 0min	0 MB	£100.00
ALLO01	07458025309	£100.00	£0.00	0h 0min	0 MB	£100.00
ALLO01	01132342948	£51.25	£0.00	0h 0min	0 MB	£51.25
ALLO01	01132451481	£33.02	£0.00	0h 0min	0 MB	£33.02
ALLO01	0365-ALLO01	£15.00	£0.00	0h 0min	0 MB	£15.00
ALLO01	07827828586	£12.50	£0.00	0h 0min	0 MB	£12.50
ALLO01	07780954043	£7.50	£0.00	0h 0min	0 MB	£7.50
ALLO01	07789753930	£7.50	£0.00	0h 0min	0 MB	£7.50
ALLO01	07789753930	£7.50	£0.00	0h 0min	0 MB	£7.50

## Optimised processes around

- In-life management of customer assets
- Customer billing and payment inquiries
- Managing customer requests for data and reporting
- Support and Service Requests
- Knowledge articles and trouble-shooting guides

# All the features you'd expect from a modern SaaS application



Intuitive and accessible design for seamless navigation and efficiency



Dynamic Intuitive ad-hoc reporting tools complement a range of preconfigured reports for flexible BI reporting



Comprehensive and Responsive APIs available for integration with any system



99.999  
% uptime



Designed with top-tier security protocols to protect your data around the clock



# CLOUD MARKET.

tools

Trusted provider of software for reselling cloud, connectivity, mobile and hardware products from any provider

- ✓ 28 years of trading and billing experience.
- ✓ 1000 software partners
- ✓ £2.4b processed revenue yearly
- ✓ ISO27001 and OFCOM TMBS accredited
- ✓ Experts who evangelise compliance and best practice

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CLOUD MARKET  
Managed Services

# Partner Process Blueprint – Your results are in!

Our team has carefully reviewed your questionnaire, and your results are now ready for you to explore!

## Supplier integrations

Friendly copy here explaining what supplier integrations are

Supplier Ordering	
EE	Attention
Gamma	Attention
Giacom	Attention
Some other	Attention

Supplier Ordering	
EE	Attention
Gamma	Attention
Giacom	Attention

## Quote to cash

Friendly copy here explaining what quote to cash is

#1 Sales	
Quoting	Good
Deal support	Attention
Order creation	Attention

#2 Ordering	
Onward provisioning	Good
Process management	Improvements
Keeping Customers Informed	Attention
Billing Configuration	Attention

#3 Billing	
Billing automation	Improvements
Revenue assurance	Good
Invoicing	Attention

#4 Self Service	
Invoicing and billing	Good
Ordering	Attention
Usage analysis and alerting	Improvements
Support	Attention

## Business application integration

Friendly copy here explaining what business application integration is

Supplier Assurance	
PSA	Attention
CRM	Attention
ITSM	Attention

Back office Systems	
Accounts	Good
Direct Debit	Good
One-off Payment	Good

# Valuation being driven by the basics

