



Cathy Horst Forsyth

## A Note From our CEO

- *Cathy Horst Forsyth*

In a world full of dissenting opinions and often polarized points of view, I like to find common ground – the things we can all agree on. Common ground isn't easy to find, but I think I found some: I don't know anyone who doesn't agree that this year has gone by faster than any other. In fact, we have been saying this all year long – 'the first quarter flew by', 'where did the summer go?', and 'wow, the holidays are here, I can't believe it'. My guess is that we will be saying all of that again in the new year. But why?

My theory is that we are all busier than ever. I'm not saying that's a good thing, just observing that the pace of the game has increased. Whether working from home, or commuting to a corporate office, the days are

now filled with back-to-back video calls (does anyone even use the phone anymore?). On particularly busy days, I have noted as many as 16 calls booked on my own calendar (not including duplicates). And I'm definitely not saying that's a good thing no time for lunch, no time to stop and chat with others or to take a walk around the block.

Much of my year was spent at my desk. While I used to travel frequently to meet with customers in the field, now those day trips have been replaced with Teams or Webex meetings. Without any required travel time, or even the time needed to get badged and take the elevator to the conference room, you can cram 16 meetings into the day... but at what cost? Obviously, burnout is an issue. But beyond that, I think most people would agree that we miss the human interaction that comes with old fashioned, face-to-face in person meetings.

At Strongbow, we have tried to bring back those face-to-face client meetings, but many teams are now scattered and often sit in disparate places. More than once we have traveled to meet a prospective client in their office, only to learn they forgot the meeting was in person and are working from home that day!

That said, I think it's more important now than ever to meet in person. It's one of my key objectives for 2023. My theory is that gross productivity will decline, but the pace of business progress and value capture will accelerate. There's no doubt in my mind that meeting in person helps build relationships and trust more quickly, and with that, shared goals and objectives can be achieved more quickly. Yes, it's expensive to travel – but like all other business investments, there is an ROI if that investment is thoughtfully made.

I'll report back next year to let you know how this theory proves out. In the meantime, I am wishing you all Happy Holidays and all the best in the new year - I hope to see you soon (in person!)

Cathy

***“Meeting in-person helps build relationships and trust more quickly, and with that, shared goals and objectives can be achieved more quickly.”***

# 2022, The Year That Was - Barry Platzman

As we close out 2022, like many of us, I am reflecting on the year that was, and what I want 2023 to look like. Luckily for me, I am an early riser, and it will be a few hours before the marathon of Zoom calls begins, so, I used some of my early morning hours to think about the many triumphs and challenges that our industry (and our world) faced this year, and how much hope there is for the future. In our final newsletter of the year, and as in past years, I wanted to share these reflections highlighting surprises (both good and bad) and to make a few predictions for the new year.

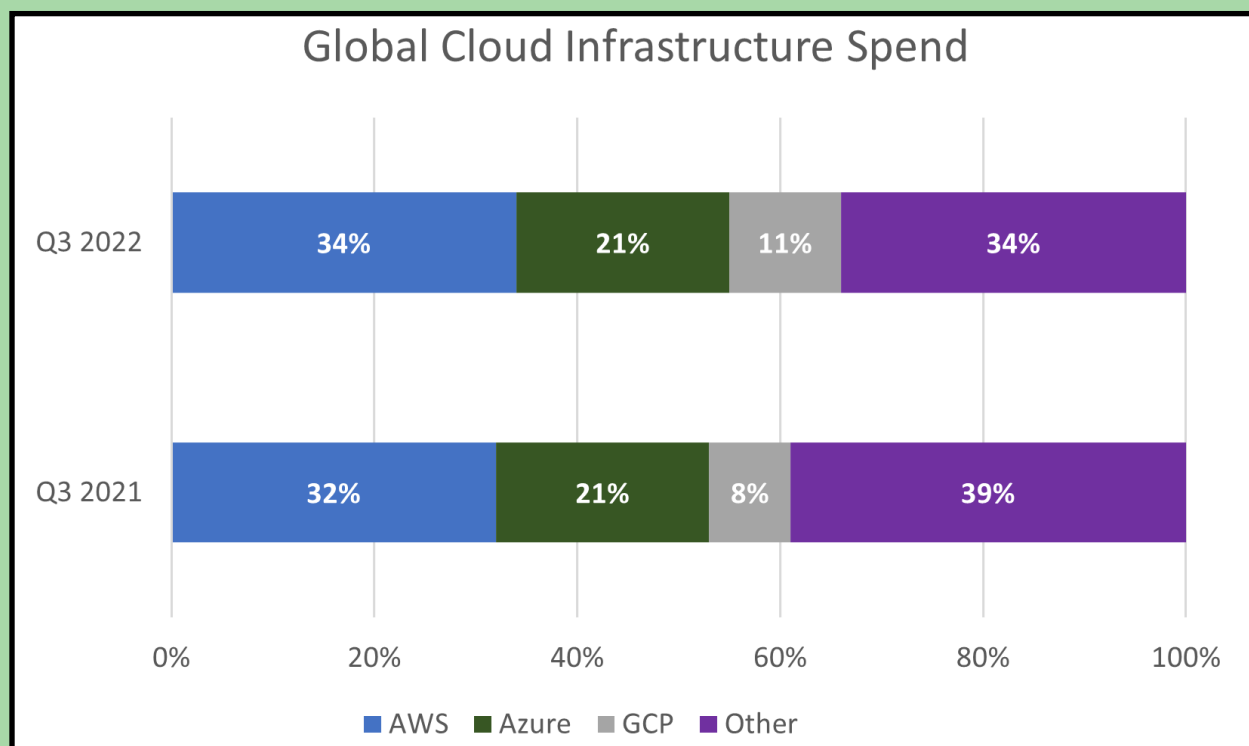
## Pleasant Surprises

This time last year, I predicted that the “cloud wars” would heat up and change the landscape in a meaningful way. I think this is happening, but maybe not in the way I imagined. This year, I have met with dozens of CIOs and CTOs of Fortune 1000 companies and there is one thing that you can always predict; we will talk about Cloud. How much cloud they are using, how fast Cloud is growing, how many Clouds do they have, want or need.

A key theme that is emerging is the desire to implement a Multicloud solution. Fewer companies are planning to rely upon a single provider. Interestingly enough, the desire for Multicloud and the ongoing cloud wars have not shifted market share across the major public cloud providers. It is

virtually unchanged from a year ago. Multicloud may not be reflected in the market share statistics, but it's coming and will take some time as there are key benefits to implementing a Multicloud architecture to look forward to.

Enterprises are thinking more about how to leverage Multicloud for increased resiliency/reliability, enabling fit-for-purpose infrastructure and managing financial and commercial risk by maintaining a competitive environment. As Multicloud solutions take root, yet another buzzword has been spawned: the “Metacloud” (no relation to Meta, Facebook's parent company discussed in the next section). I am excited to see how the Metacloud develops and look forward to the day when applications can be seamlessly transferred across cloud providers based on real-time business needs.



The introduction of Multi/Metacloud will also introduce new complexities, both operationally/technically and financially. More specifically, these financial implications are shaping the story around FinOps. We talked a lot about FinOps in 2022, both with customers and with industry experts like ONUG. FinOps is gaining traction within Enterprises and is gradually becoming more mature as more applications move to the Cloud and Cloud spending increases. As standards around FinOps continue to evolve, we continue to argue that FinOps should address not only new costs in the public Cloud, but also legacy costs for on-prem data center infrastructure.

This TCO view of FinOps is critically important as IT leaders need to have meaningful conversations with the CFO around financial forecasting and planning for potential dual running costs. Cloud migrations consistently take longer than expected and, in most cases, Enterprises are making the decision to run a hybrid environment (Cloud and on-prem) for the foreseeable future. This requires more thoughtful and careful financial planning. The last thing any CFO wants to hear is an unplanned ask for capital for Data Center refresh when 'everything was supposed to be moving to the Cloud'.

Additionally, as part of a robust FinOps process, Enterprises should complete financial analysis as a financial checkpoint before moving applications to the Cloud. This helps in two ways. First, companies are identifying applications that could be eliminated altogether (as much as 20% in some cases), saving valuable resources and time in moving to the Cloud. Second, companies should carefully weigh the benefits and risks of 'lift and shift' vs. re-platforming.

In 2023, the cloud wars will continue to heat up. We look forward to some real competition and moving away from the duopoly that we see today. But competition will lead to complexity. Along with that complexity, financial pressures will drive the FinOps conversation well beyond charge back, show back and optimizations to more forward-looking conversations including capital planning, application modernization and application ROI.

## **Still Waiting...**

Over the past couple of years, I have been writing about 5G and Low Earth Orbit (LEO) satellites and their potential use for Enterprise WAN connectivity. Last year at this time, I predicted that we were 2 to 4 years away from 5G making an impact for Enterprise WAN customers, and sure enough, 5G was not a headline maker in 2022.

## ***“As Multicloud solutions take root, yet another buzzword has been spawned: the “Metacloud”***

As for LEOs, I am happy to report that my Starlink kit finally arrived and the technology works remarkably well. In addition, we saw real-life application of this technology on the front lines of the war in Ukraine. I believe adoption in the enterprise is just around the corner. Just in the month of December, two of our Enterprise customers reported that they are testing Starlink for WAN connectivity in some hard to reach places.

The importance of these wireless WAN options only grows as we see carriers taking more and more aggressive actions to force customers off copper-based services. While we don't see many enterprises arguing to keep their TDM infrastructure, in many cases, the lack of feasible replacement alternatives compounds the challenge, making LEOs an even more interesting trend to watch in the near future.

## **Hope For the Future**

We all know that technology is changing rapidly and will continue to evolve the human experience. There are so many new and exciting technologies and use cases that will make the world a better place. Environmental, Social and Governance (ESG) is a term that has been in the news quite a bit this year, often with the tinge of controversy. While I am no expert in ESG, I certainly get excited when I think about the amount of potential investment in this space, and the potential impact on technology, infrastructure and our Enterprise customers.

One of the major goals of ESG policies and programs is to seek to lower greenhouse gas emissions and CO2 footprint. Data Centers are a significant contributor to CO2 emissions generating ~3% of global carbon emissions, which is roughly equal to the output of the global airline industry.

As data centers grow, so do these emissions, although (thankfully) many companies now have efforts to become carbon neutral with the data center industry as a whole targeting 2050.

One contributor that may help drive lower emissions is the development of custom silicon chips. We have seen these adopted in the consumer electronics space. I predict that many companies will spend more time proactively planning to leverage custom silicon chips, both to reduce energy consumption (and cost) but also to increase overall performance as well.

Finally, one last prediction for the year ahead. If energy consumption and operating costs are reduced through these custom silicon chips, Enterprises might pivot back to building their own data centers again. This is especially true as many companies and governments consider the concentration risk of aggregating so much commerce and critical data in the public Cloud. When weighing that risk, the pendulum may very well swing away from cloud and back to an on-prem data center (with all the advancements of virtualization and containerization of course).

As we look ahead to the new year. I want to wish everyone a joyful holiday season (no matter if you celebrate in the real world or the Metaverse) and a healthy and prosperous new year!

How LEOs Compare To Bandwidth Alternatives					
	Satellite		Terrestrial		
	LEO	GEO	Fiber	5G	LTE
Speed	100 Mbps	<25 Mbps	1-10 Gbps	Up to 1 Gbps	50 Mbps
Latency	<30 ms	>500 ms	<15 ms	<30 ms	<50 ms
Coverage	Global	Near global	Dense urban and urban	Urban and rural	Suburban and rural



**Marianne Ramer**

## Team Spotlight - Marianne Ramer

Whether we are helping customers with their cloud migration strategy or negotiating an Enterprise buying agreement for IT services, financial modeling is foundational to how Strongbow analyzes information and formulates recommendations for our customers. Marianne Ramer, our Director of Analytics, has helped build and train our team of financial analysts over the past five years. Marianne is responsible for training our analyst team and driving client projects effectively and efficiently throughout the engagement life cycle. Marianne has been with Strongbow since 2017 and has been in the telecom industry for 20+ years, holding a variety of roles in Accounting, Contract Management and Procurement at Verizon and other large financial firms. When Marianne is not busy working with Strongbow's clients and analyst team, she enjoys spending time in the park with her spunky dachshund Daisy and driving along the California coast visiting family and exploring new locales.

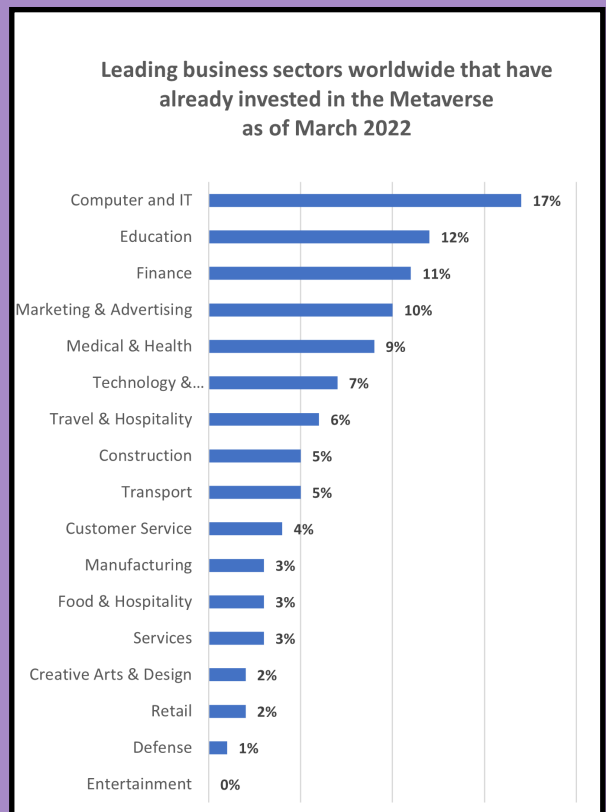
# Office-Verse

— Barry Platzman

I recently attended The New York Time's DealBook Summit. This was the first DealBook held in person since 2019, and it was absolutely fantastic. One of the highlights was Andrew Ross Sorkin's interview with Mark Zuckerberg. When I think about Facebook, or Meta, I usually think about a teenager (or my mother) sharing videos and their latest status. But what I definitely hadn't considered before is Meta's potential use case within the Enterprise.

While Meta certainly doesn't rank as a top vendor for any of our Enterprise customers, AWS absolutely does. Amazon's CEO and former AWS lead, Andy Jassy, also spoke at DealBook. Rather surprisingly, he did not mention the word "cloud" during his interview until minute 41 of 44 in the interview. I only point this out to contrast what we heard from Zuckerberg, who started to lay out his vision for how we will communicate, collaborate and These days, like most of our Enterprise customers, I spend a lot of time in front of a screen on Zoom (or Teams or Webex). As Cathy mentioned in her opening, we are looking to be in-person with customers more in 2023. I, for one, am a person who is energized by being with customers in person. I began to wonder if the Metaverse takes off, how long it will take before we have meetings in the Metaverse? Will the Metaverse provide equal footing for workers in a virtual environment where they can choose between work from home and office-based work?

Regardless, the Metaverse seems well-poised to be a big business where customers can attend events, buy products and services and have an in-store like experience.



Musicians like Charlie Puth and Ariana Grande have already given concerts in avatar form. Some Banks (and regulators) are already thinking about what a branch experience would look like in the Metaverse. This could be a major disruptor to many human experiences, one that would also require even more network and server power to deliver a seamless experience. In Mark Zuckerberg's interview, he also discussed how Meta is investing in custom silicon chips to help drive the compute power necessary to deploy this technology at scale. While visionary, this reality may not be so very far into our future – only time will tell.

## About Strongbow

Leveraging our deep technical and commercial expertise from the Data Center to the Desktop, Strongbow helps Fortune 500 companies plan, build and implement infrastructure modernization plans for improved resiliency and speed to market in today's fast paced digital economy.

Our experienced bench of consultants understand next-generation technologies and legacy technologies, including bespoke configurations and outdated systems. Bridging the gap between old and new is critically important when delivering successful change programs with strong, positive financial returns.

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