

# THE ACTIVATION GAP: ORCHESTRATING THE TELCO-TO-TECHCO METAMORPHOSIS



When Networks Move Faster Than  
Marketing We Turn Data And Technology  
Investments Into Measurable Growth  
And Efficiency



## Silent Churn & Lost Deals: The Cost of Inaction

### The Consumer who Turned Away

Sarah is a high-value subscriber and competitive gamer. Tuesday night, mid-tournament, her network jitters. The OSS (Operational Support Systems) logs it. Marketing sees her as “Gold Subscriber.” Two days later, she gets a generic email: “Upgrade to a new iPhone!” She feels ignored. She doesn’t call support but quietly switches to a competitor’s “Gamers Plan.”

### The Missed B2B Opportunity

A logistics company simultaneously posts job openings for “Robotics Engineers,” while also searching for “Warehouse Automation.” The marketing team of the telco reads this search as a standard ask. A generalist sales rep from the telecom company calls back with a generic question: “Do you need more bandwidth?” The CIO ignores it. The company buys a complex Private 5G solution from a systems integrator who understood its business.

These stories aren’t outliers—they’re symptoms of a deeper disconnect. In today’s telecom landscape, opportunity is everywhere, but activation is everything.



## Rich in Assets, Broke on Activation

The era of selling minutes, bytes, and SIMs is over. As B2C hits saturation and 5G commoditization erodes pricing power, telcos are facing an existential shift: to evolve from connectivity providers into TechCos that are digital platforms orchestrating intelligent experiences.

But here's the problem. Networks run at 5G speeds while commercial engines stall on legacy processes. This is the "activation gap." Despite billions invested in MarTech stacks, data lakes, and CDPs, most operators remain "asset rich but activation poor." The data exists. The activation doesn't.

Here the telecom CMO faces a paradox: play aggressive offense to capture new value while simultaneously playing radical defense to protect margins. This is the dual mandate of delivering growth and efficiency simultaneously.

### Making a Case for Intelligent Data Transformation

- The Maturity Gap: Only 29% of Telcos have the data foundation to support AI
- The Prize: Organizations that bridge this gap see 12% revenue growth, 15% operational efficiency, and 25% CSAT lift

## From Silos to Stalemate: The Hidden Barriers to Growth

The activation gap isn't a technology problem, but a structural one rooted in how telcos evolved. The OSS/BSS wall means network data lives in operational systems that don't communicate with marketing platforms, so frustration signals never reach the teams who could act on them.



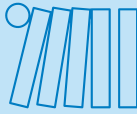
Manual content supply chains can't scale to produce thousands of personalized variants, and commercial latency ensures that by the time marketing moves, the moment has passed. Furthermore, the attribution gap keeps marketing metrics (clicks, opens) isolated from billing systems, so no one connects campaign actions to actual revenue or churn.

### The MarTech Paradox: All Input, No Output

*The "Activation Gap": Why MarTech Investments Are Not Delivering Growth*

Telcos are "Asset Rich" (Data/Tech) but "Activation Poor."

Despite massive investments in CDPs and CRMs, the Activation Gap is causing growth mandates to stall

 <b>The "As Is" Reality</b>	 <b>The Root Cause</b>	 <b>The Business Consequence</b>
<ul style="list-style-type: none"> <li>Legacy Systems &amp; Siloed Data: Data sits in platforms (CDPs) but isn't transforming into outcomes.</li> </ul>	<ul style="list-style-type: none"> <li>The OSS/BSS Wall: Network data (dropped calls) doesn't talk to Marketing data (contract status) in real time. You are capturing data, but not capitalizing on it.</li> </ul>	<ul style="list-style-type: none"> <li>Silent Churn (B2C): By the time you identify a signal (e.g., Bill Shock or Jitter), the legacy latency means the "Save Offer" arrives 2 weeks too late. High-value users leave silently.</li> </ul>
<ul style="list-style-type: none"> <li>The Content Supply Bottleneck: You have 10M customers but creative capacity for only 5 generic segments.</li> </ul>	<ul style="list-style-type: none"> <li>Manual Design Limitations: Human teams cannot physically produce the thousands of assets required for "Segment of One" personalization.</li> </ul>	<ul style="list-style-type: none"> <li>Commodity Trap (B2C): Inability to target microsegments (e.g., Gamers) forces you back to "Spray and Pray" campaigns focused on price, eroding margins.</li> </ul>
<ul style="list-style-type: none"> <li>Delayed &amp; Expensive Execution: Campaigns take weeks to market. Creative adaptation costs outweigh campaign lift.</li> </ul>	<ul style="list-style-type: none"> <li>The Intent Blind Spot: Legacy B2B marketing generates generic leads based on firmographics, lacking real-time "Business Intent" signals.</li> </ul>	<ul style="list-style-type: none"> <li>Stalled Pipeline (B2B): Sales reps waste time on cold calls while competitors with agile, intent-driven insights close the complex Private 5G/IoT deals.</li> </ul>
<ul style="list-style-type: none"> <li>ROI Disconnect: Finance sees "Activity" (Clicks), not "Cash Impact" (ARPU).</li> </ul>	<ul style="list-style-type: none"> <li>Broken Attribution: Marketing activity is tracked in ad platforms, while revenue sits in billing systems, with no direct line of sight.</li> </ul>	<ul style="list-style-type: none"> <li>Budget Cuts (Efficiency): Without proven "Cash Impact" (CAC/ARPU), Marketing is viewed as a Cost Center, leading to budget slashes during efficiency drives.</li> </ul>

## The Solution: From Static Data to Dynamic Revenue with Infosys Aster

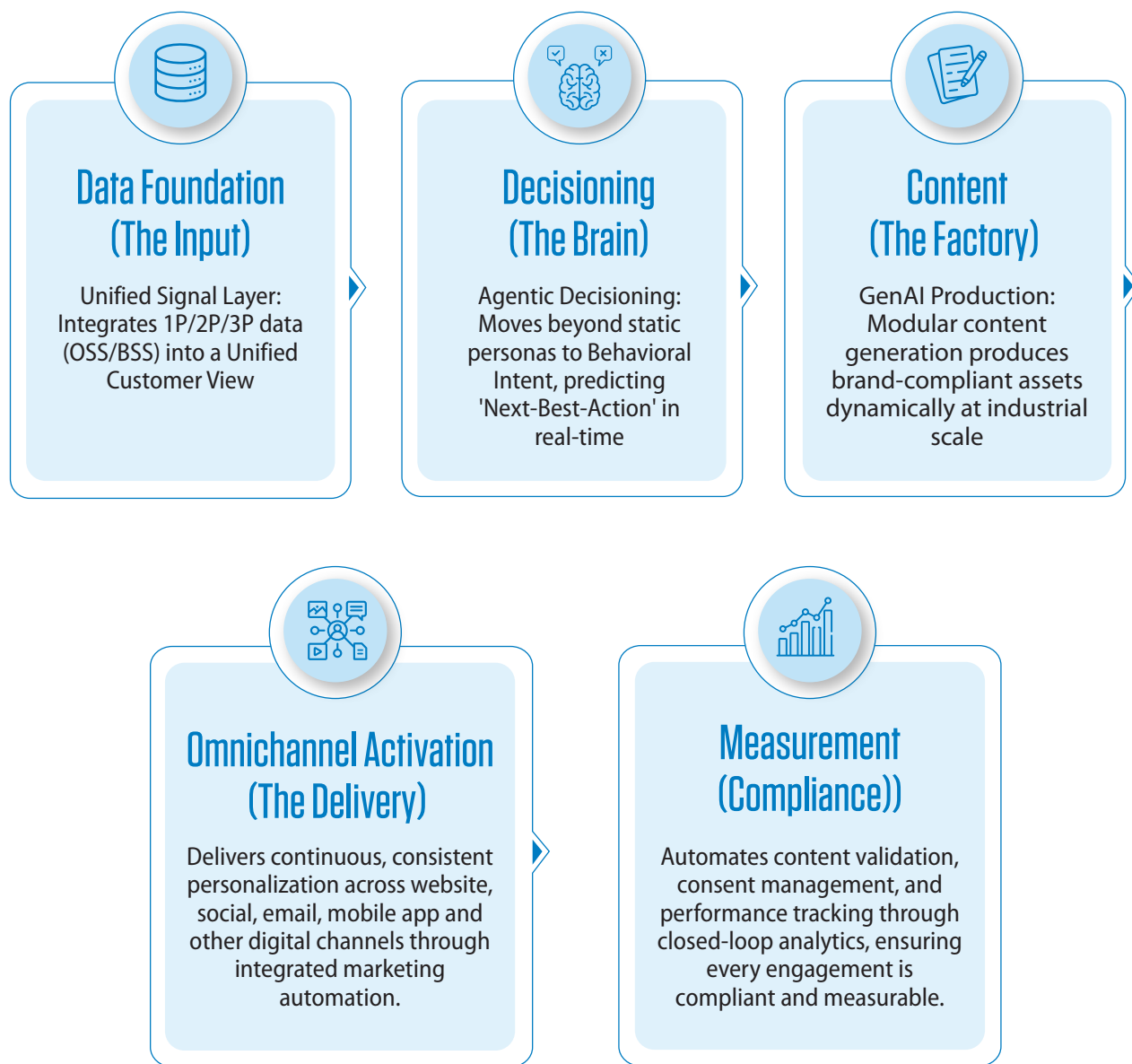
Infosys Aster isn't a MarTech replacement. It's the AI-enabled activation layer sitting on top of your existing investments, turning static data into active revenue

signals without rip-and-replace. It orchestrates the entire marketing lifecycle from strategic blueprint to the final pixel the customer sees.

### The Architecture (The Operating Model)

*Infosys Aster Vision: Transforming Data to Decision to Delight*

A proprietary operating framework that bridges the Activation Gap by connecting the disparate worlds of Data, AI, and Content





## The Multiplier Effect: When Platform Meets Intelligence

Through our strategic partnerships, we combine experience platforms with Infosys Aster to deliver self-driving marketing. We're supercharging real-time CDP by injecting industry-specific intent signals and industrializing Generative Content Studio to auto-generate thousands of localized variants.

Clients leveraging this joint solution report 27% improvement in campaign performance and 20% gain in operational efficiency.

## Blueprints to Breakthroughs: Turning Vision into Value

### The Efficiency Engine (Value Protection)

- **GenAI Content Factory:** Shift from manual design constraints to an integrated supply chain. Infosys Aster decouples creative strategy from production, using GenAI to auto-resize, translate, and adapt imagery. The "Personalization Math Problem" (1 message × 50 variants) gets industrialized without expanding headcount.  
Impact: 60-70% creative reuse | 30-60% lower run costs
- **Signal-Driven Operations:** Shift from calendar-based planning to AI-enabled signal-driven steering. Infosys Aster compresses campaign cycles from months to weeks by replacing manual handoffs with intelligent automation.  
Impact: 50% faster time-to-market | 1.2x lift in engagement

### The Growth Engine (Value Creation)

- **The Experience Guardian (B2C):** Shift from reactive retention to proactive care. Infosys Aster bridges the OSS/BSS divide, integrating network telemetry (high packet loss) with marketing systems to detect frustration signals and auto-trigger "Proactive Apology" offers before customers contact support.  
Impact: 10-20% churn reduction in high-value segments



- **The Infinite Sales Team (B2B):** Shift from generic lead gen to precision deal orchestration. Infosys Aster empowers sales reps to sell complex solutions (Private 5G) through AI Commerce agents that scrape external intent data and auto-generate custom "Vision Papers" for consultative conversations. Impact: Higher win rates | Accelerated pipeline velocity

## From Missed Signals To Meaningful Moments: The Customer Journey Reimagined

The difference between a Telco and a TechCo isn't the fiber in the ground; it's the intelligence of the interaction. Below, we contrast the current reality hampered by the activation gap with the future reality, powered by Infosys Aster.

### Journey A: The "Silent Churn" Scenario (B2C)

Persona: Sarah, a high-value subscriber and competitive gamer.

 <b>The "As-Is" Telco Experience</b>	 <b>The Infosys Aster "TechCo" Experience</b>
<p><b>The Trigger:</b> Sarah experiences high network jitter during a gaming tournament on Tuesday night.</p>	<p><b>The Trigger:</b> Sarah experiences high network jitter during a gaming tournament on Tuesday night.</p>
<p><b>The Disconnect (The Gap):</b> Network data (OSS) logs the error, but it sits in a silo. Marketing data (BSS) sees Sarah only as a "Gold Subscriber."</p>	<p><b>The Unified Signal:</b> Infosys Aster's Data Foundation connects OSS and BSS in real-time. It identifies Sarah as a "Gamer Segment" and flags the jitter as a "Frustration Signal."</p>
<p><b>The Reaction:</b> Two days later, a scheduled marketing campaign sends Sarah a generic email: "Upgrade to a new iPhone!"</p>	<p><b>The Agentic Decision:</b> Infosys Aster's Brain calculates the churn risk. It determines the Next Best Action is not a sale, but an apology.</p>
<p><b>The Outcome:</b> Sarah feels ignored and misunderstood. She doesn't call support; she silently switches to a competitor offering a "Gamer's Plan."</p>	<p><b>The Activation:</b> Within minutes, Sarah receives a proactive SMS: "We noticed a wobble in your connection. We have applied a free 24-hour speed boost for your next game. Game on."</p>
<p><b>Result: Silent Churn.</b></p>	<p><b>Result: Loyalty &amp; Advocacy.</b></p>



## Journey B: The “Missed B2B Opportunity” (B2B)

Persona: A mid-sized firm modernizing their warehouse.



### The “As-Is” Telco Experience

**The Trigger:** A logistics company posts job openings for “Robotics Engineers” and searches for “Warehouse Automation.”

**The Disconnect (The Gap):** Marketing sees the company only as a standard business account buying 50 SIM cards. The “intent signals” are missed.

**The Reaction:** A generalist sales rep calls the company with a standard script: “Do you need more bandwidth?” The CIO at the logistics company ignores the call.

**The Outcome:** The company buys a complex private 5G solution from a systems integrator who understood the business problem.

**Result: Stalled Pipeline.**



### The Infosys Aster “TechCo” Experience

**The Trigger:** Company posts job openings for “Robotics Engineers” and searches for “Warehouse Automation.”

**The Intent Signal:** Infosys Aster’s Infinite Sales Team agent scrapes external data, identifies the hiring trend, and flags the logistics company as a high-propensity target for Private 5G.

**The Creation:** Infosys Aster’s GenAI Factory auto-generates a custom “Vision Paper”: “How Private 5G Solves Latency for Warehouse Robotics.”

**The Activation:** The sales rep receives the lead and the custom content. They approach the CIO as a consultant, not a vendor.

**Result: High-Value Deal Closed.**

## Speed, Scale, ROI: The Metrics of Momentum

Infosys Aster delivers unprecedented speed, scale, and proven ROI:

**30-50%**

increase in speed-to-market

**25-30%**

uplift in B2C upgrades and B2B conversion

**10-20%**

churn reduction in targeted cohorts

**50-60%**

improvement in ROI attribution accuracy

**1.2x** lift in campaign engagement

## Close the Activation Gap, Unlock the TechCo Future

The transition to TechCo is non-negotiable. Execution speed is the only variable one can control. Infosys Aster is already delivering this velocity for the world’s leading operators. By deploying the activation engine, these leaders prove it’s possible to achieve the dual mandate of radical efficiency while capturing new growth.

Sarah, the competitive gamer, went from silent churn to vocal advocate. With Infosys Aster’s unified signal layer detecting her network jitter in real time, she received proactive care that transformed a technical failure into a loyalty moment.

With the warehouse modernization opportunity, the logistics company went from missed pipeline to strategic partnership. With Infosys Aster’s Infinite Sales Team identifying external intent signals and auto-generating consultative content, the sales team closed a complex Private 5G deal as trusted advisors, not commodity vendors.

These aren’t hypothetical scenarios. They’re the daily reality for operators who’ve closed their activation gap.



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