

Time Warner Cable as a Telco Alternative and perceptions of Cablecos

Telegration Agent Advisory Council – Detroit, MI
Thursday, January 12th 2012

Agenda

Intro & overview

Business Solutions overview

Perceptions of Cablecos as Telecom Providers

Opportunity for Cable in B2B

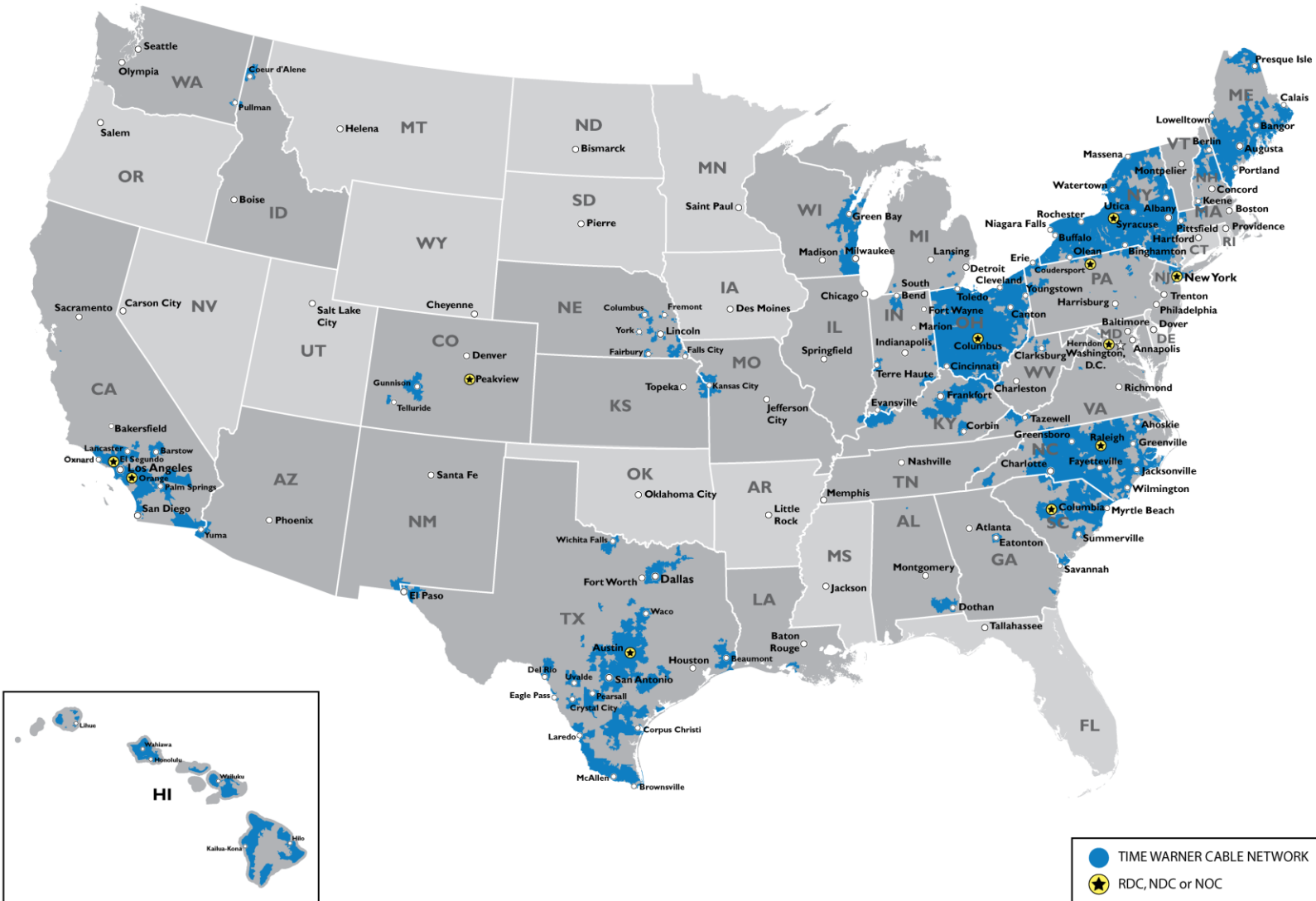
Why Cable for your Business Customers?

Intro to TWCBC and company overview

Time Warner Cable Business Class

- **Business-to-Business arm of Time Warner Cable, providing commercial services since 1998**
- **Part of a \$19.8B, financially stable company**
- **Headquartered in New York, New York**
 - 47,000 employees companywide dedicated to serving commercial & residential
- **Full suite of advanced services backed by strong technical support**
 - Advanced Ethernet, Internet, Phone, and Cable TV
 - Scalable business solutions designed to meet the diverse needs of businesses
 - Dedicated Partner Channel support structure with local field sales support and service teams

National Reach, Local Presence



2012 Strategy for Success

**How are “WE”
TWCBC Partner Channel
Successful in 2012**



Partner Channel - 2012 Strategy

Mission is to deliver **“BEST IN CLASS”** Channel Program

❑ **Manage a Single Channel Partner Program for TWCBC**

- Internal consistency with strategy and approach
- External “ease of doing business” with partners

❑ **Contract Best of Breed Sales Partners**

- Focus will be on a select number of quality partners, rather than high quantity of players

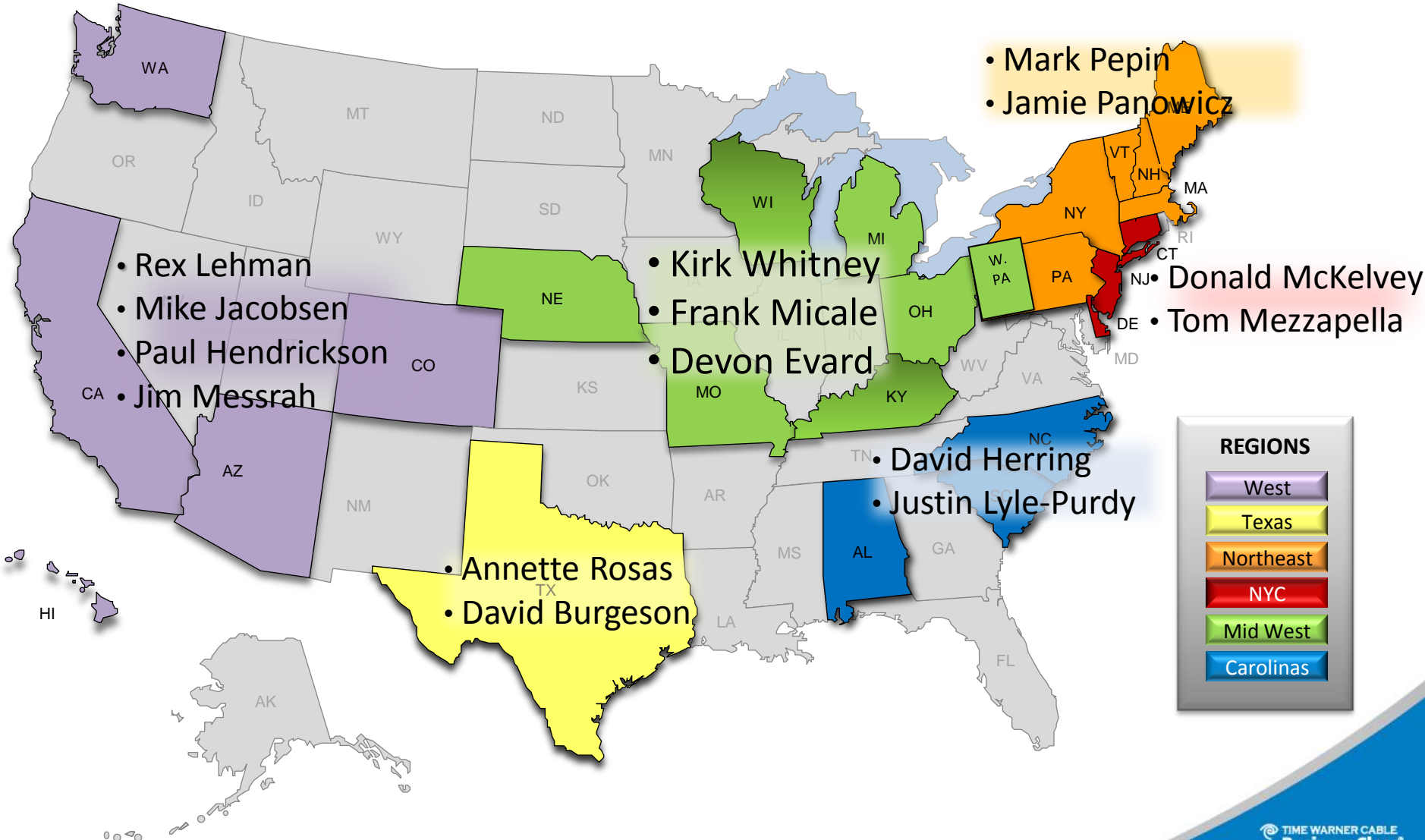
❑ **Continue to invest in a *“Best in Class”* partner experience**

- Dedicated partner account / support teams
 - ✓ PCM / RCM / Marketing / Training / Sales Ops / Regional Ops
- Self-service quoting and order management
 - ✓ Salesfoce.com
 - ✓ Integrate w/ Partner’s systems via API

❑ **Solidify partnerships**

- Training Webinars, Road shows & Sales Spiff’s
- Partner Advisory Council

Regional Channel Manager Sales Territories - 2012



Business Solutions

Target: Triple-play for SMBs



Internet

- High-Speed Internet Access
 - Scalable bandwidth tiers up to 15Mbps (downstream) x 2Mbps (upstream)
 - **Wideband Internet** up to 50Mbps x 5Mbps available in most markets
- Business Class Value-Added Products
 - Static IP

Voice

- Business Class Phone
 - Feature-rich multi-line (1-20) business phone service with crystal-clear digital connections
 - Multiple calling plan options
 - Business-rich features included

Business Cable TV

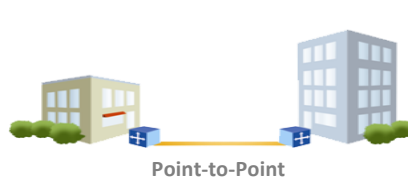
- Cable TV and Music Choice services
- Standard, Digital, and HDTV service options

Target: Mid-Market & Enterprise



Ethernet Solutions

- Fiber Optic Connectivity
- Layer 2 point-to-point, point-to-multipoint, and multipoint configurations
- Metro & Regional transport options
- With or without Internet Access
- Scalable at port speeds of 5, 10, 20, 30, 40, 50 Mbps up to 10 Gig
- SLAs available
- MEF Certified Carrier



Complete bypass of local Bell Central Offices -
100% of infrastructure is Time Warner Cable

Target: Mid-Market & Enterprise



Business Class PRI

- IP-enabled voice solution
- A true alternative to the LECs
- Allows customers to keep current telephone numbers and existing equipment
- Fractional options of 8, 12, and 16 “B” voice channels



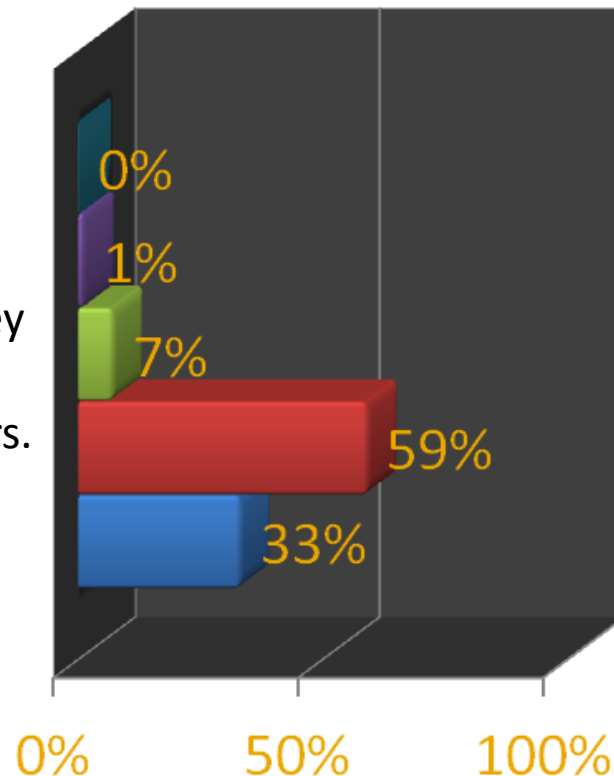
Delivery options over Coax or Fiber -
100% of infrastructure is Time Warner Cable

Top 5 Perceptions of Cablecos as Telecom Providers

Channel Partners: Cablecos & The Channel: State of the Market 2011, August 2011

1. Internet Access Provider

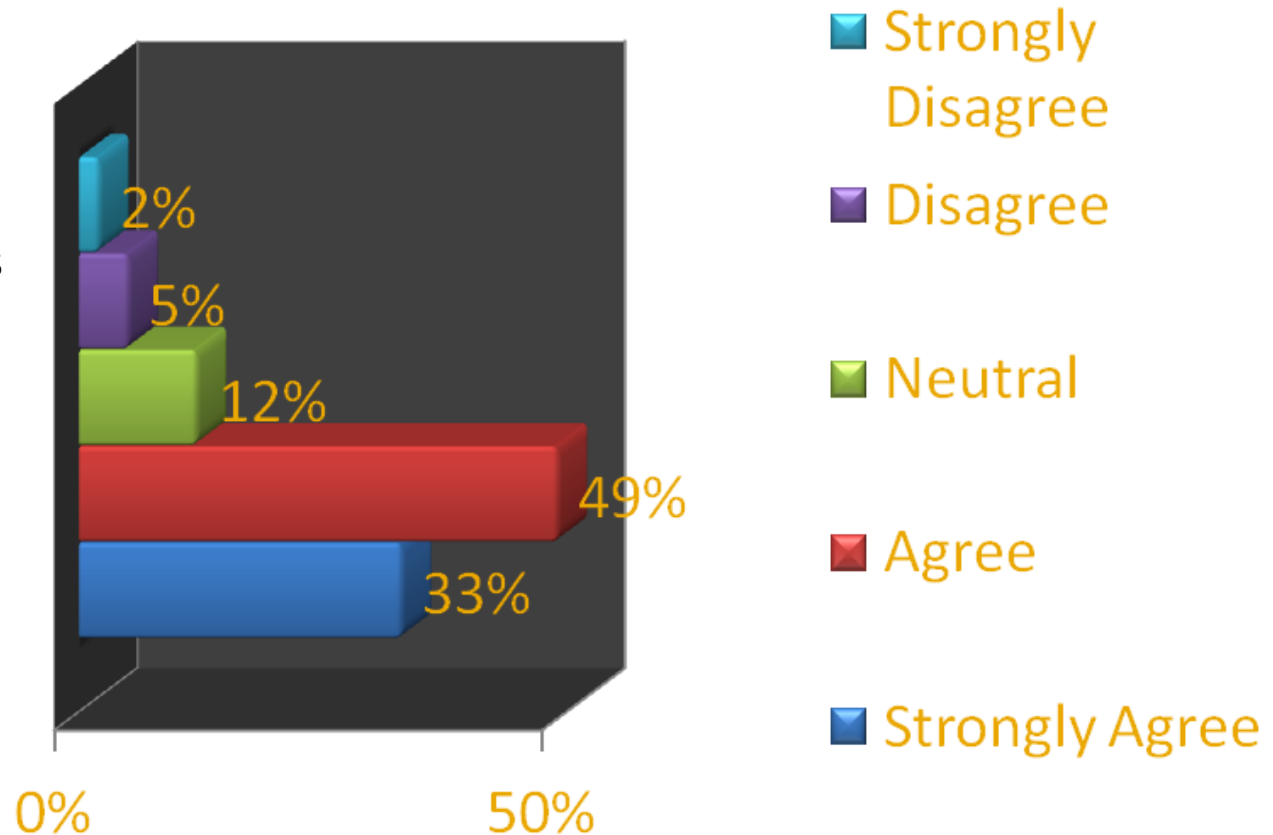
92% of channel partner respondents “agree” or “strongly agree” that they perceive cablecos as Internet service providers.



- Strongly Disagree
- Disagree
- Neutral
- Agree
- Strongly Agree

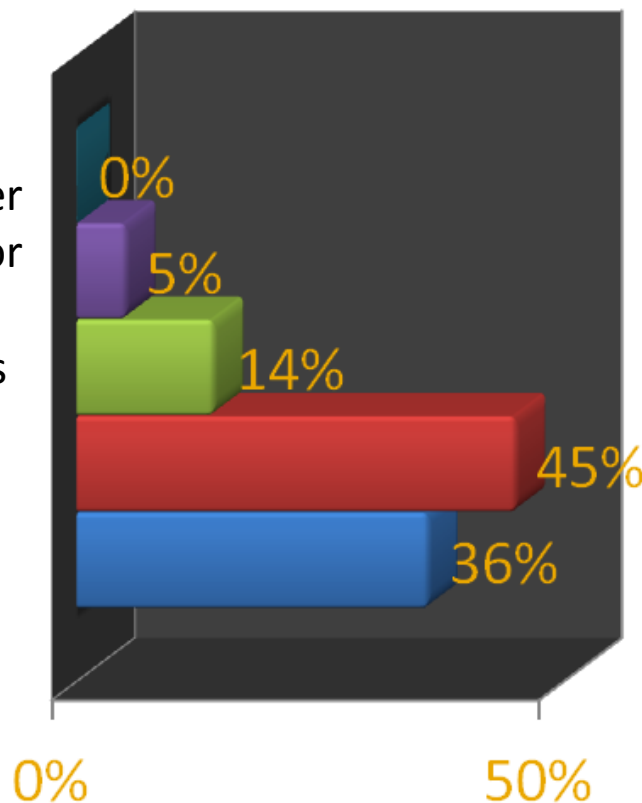
2. Redundant/Diverse Network Provider

82% of channel partner respondents “agree” or “strongly agree” that they perceive cablecos as redundant/diverse network providers.



3. Low-Cost Provider

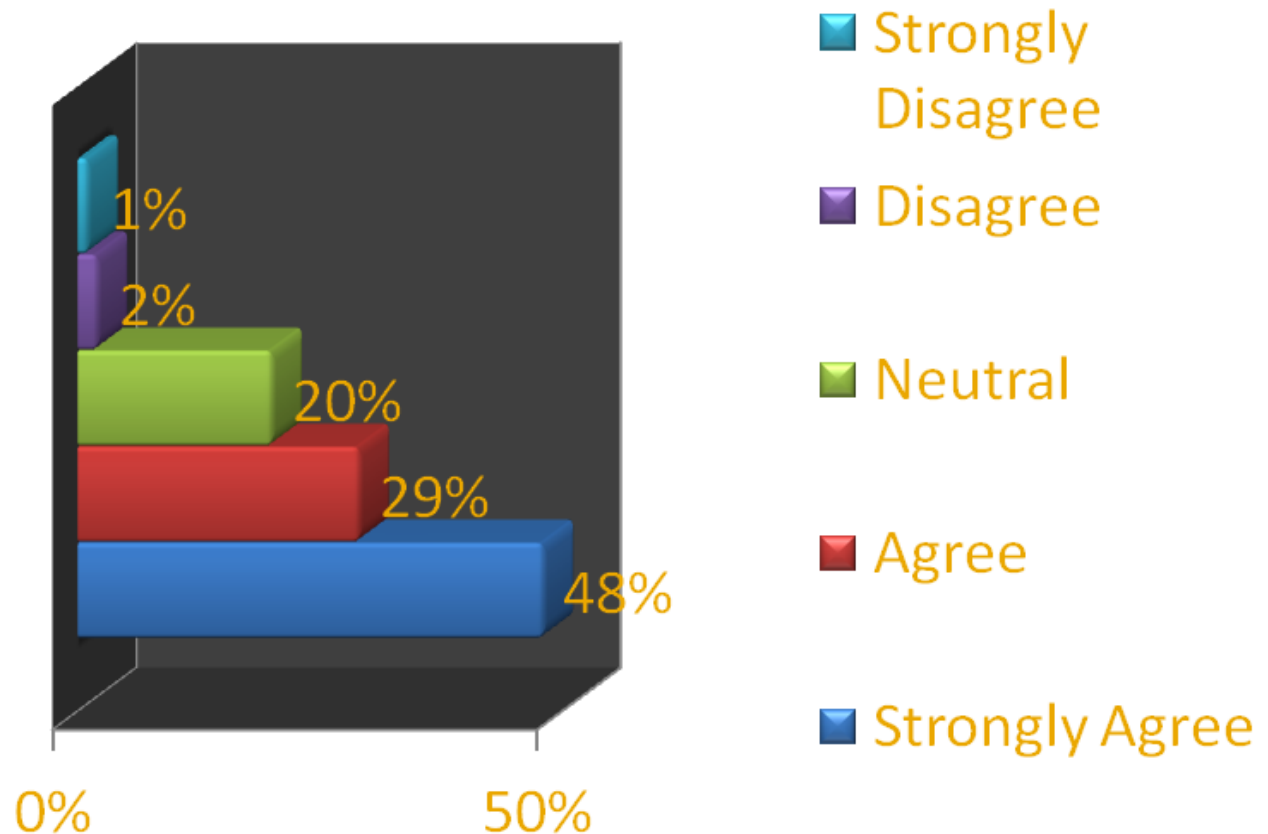
81% of channel partner respondents “agree” or “strongly agree” that they perceive cablecos as low-cost providers.



- Strongly Disagree
- Disagree
- Neutral
- Agree
- Strongly Agree

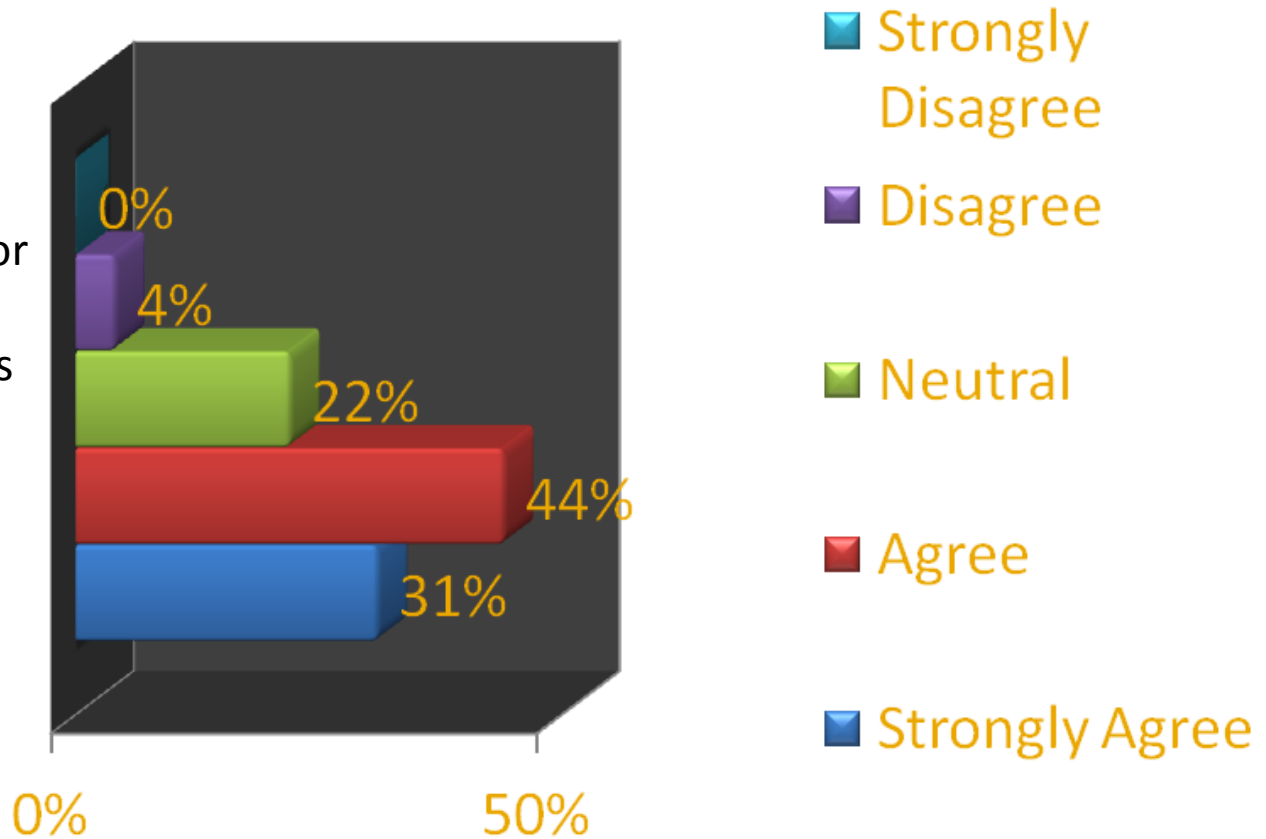
4. Triple-Play Provider

77% of channel partner respondents “agree” or “strongly agree” that they perceive cablecos as triple-play providers.



5. Financially Stable Network Provider

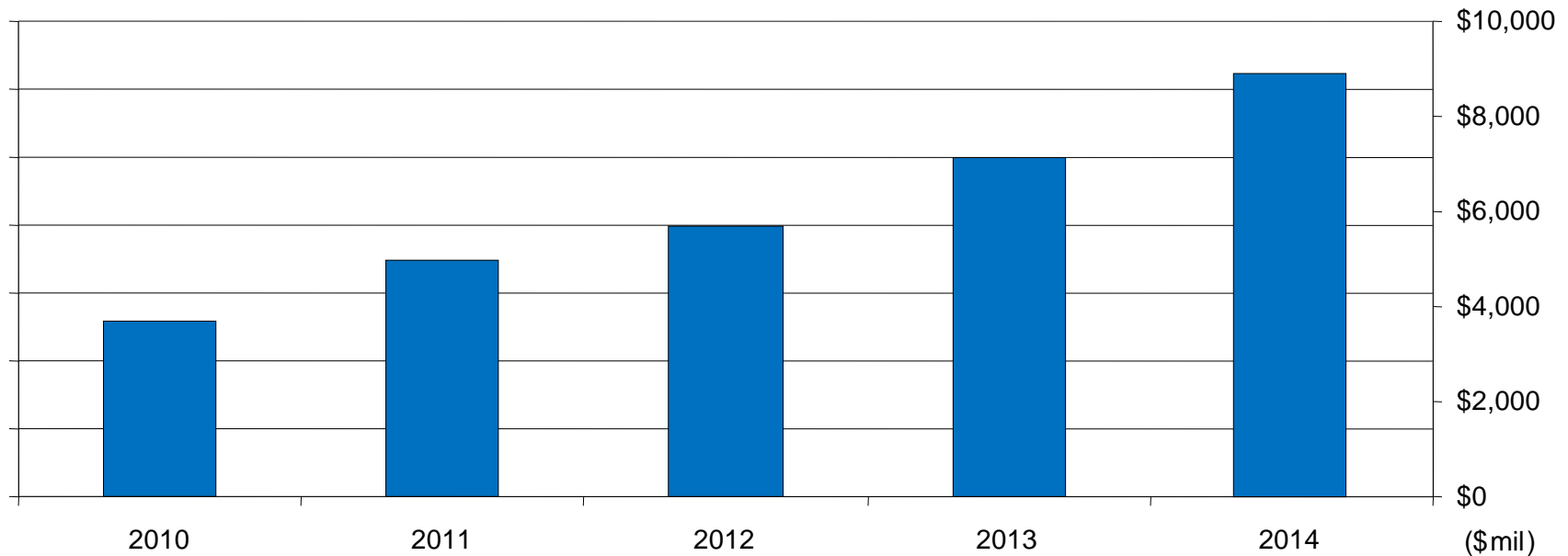
Three-fourths of channel partner respondents “agree” or “strongly agree” that they perceive cablecos as financially stable network providers.



Opportunity for Cable in B2B space

Cable's Opportunity in Business Telecom

Cable Industry Business Services Revenue



Source: New Paradigm Resources Group, Inc.

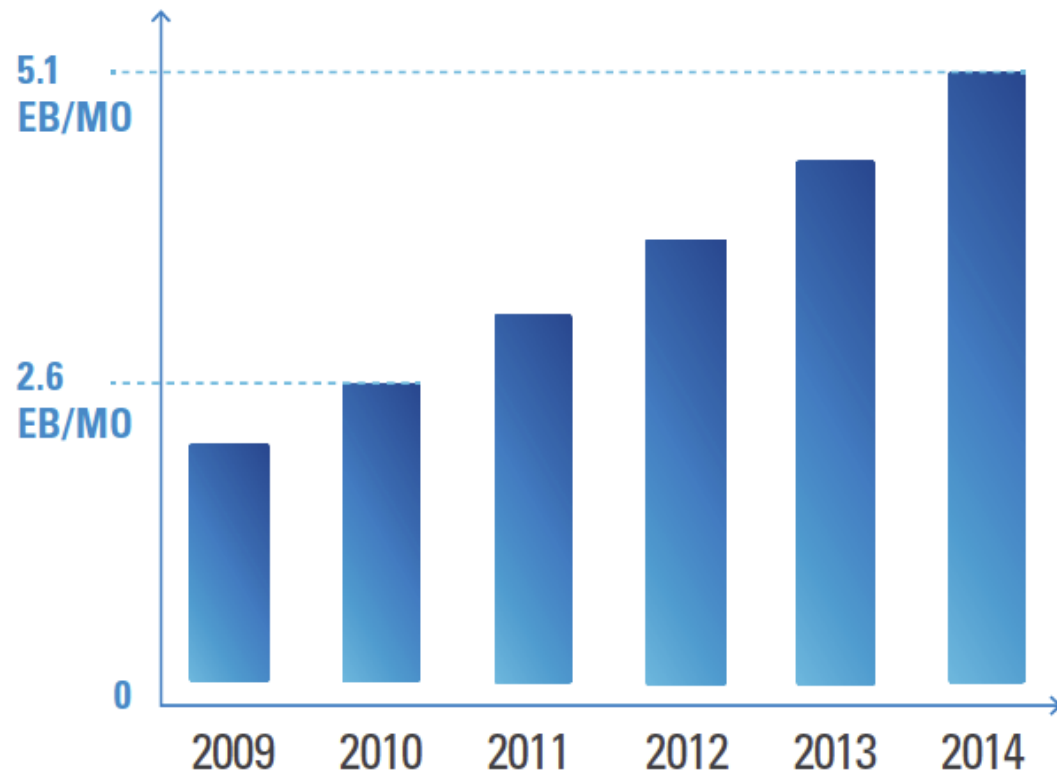
- B2B revenue expected to double **over next 4 years**
- Strongest revenue growth in Medium Business segment
 - Underserved by Telcos – looking for alternate provider

Business Data Growth

More Innovation, More Traffic

Figure 1:
Expected Data Traffic
through 2014

Business Internet



Source: Cisco CLUE, 2010

* Additionally, Cisco found that Internet traffic demand among businesses in North America grew by 17.2% in 2010, the most of any region in the world.

Why Cable for your Business Customers?

Cable offers Connectivity solutions that scale



Why Time Warner Cable Business Class

Agents are increasingly turning to Time Warner Cable for:

1

Carrier Diversity – adding a Cable Operator to your portfolio provides an alternative solution to traditional Telco providers.

2

Reliability - Partner with a network diverse, facilities-based service provider that has a name your customers know and trust.

3

Reach - dense TWC infrastructure offers quick sales which leverage the base of 'lit' on-net buildings

4

Scalability – offer higher Internet throughput speeds with our high-capacity alternatives to traditional copper-based services like DSL or T1s

Q&A



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