

Industry Analyst Jeff Kagan: It is too early to judge Verizon earnings under new CEO

Will new Verizon CEO Dan Schulman's recovery plan succeed?

ATLANTA, GA, UNITED STATES, January 29, 2026 /EINPresswire.com/ -- The following commentary is from Jeff Kagan, an [Industry Analyst](#) and Columnist who has covered wireless, 5G, AI, telecom, and emerging technology trends for several decades.

This commentary may be used by the media in their coverage of this story, attributed to Jeff Kagan.

Kagan advises investors, business customers, and consumers not to judge [Verizon](#) too quickly or too harshly based on the most recent [earnings](#) report.

The reason, Kagan explains, is that Verizon appointed Dan Schulman as its new CEO in October 2025. Schulman needs time to assess the company, develop a strategy, and implement recovery initiatives.

"It has been quite a while since Verizon has shown strength, and investors are understandably impatient to see improvement," said Kagan. However, Kagan does not believe the current earnings report reflects what Verizon may become over the next several years.

"As an industry analyst, I have followed Verizon, along with AT&T, T-Mobile, telephone companies, and cable TV providers, through periods of both growth and struggle for several decades," Kagan said.

Many of these companies began as Baby Bells and once led the industry with basic telephone services. Today, traditional phone and pay-tv businesses are being replaced by wireless, mobile data, streaming services, and all sorts of new digital platforms.

Artificial intelligence represents the next major growth opportunity and challenge for every competitor.



Industry Analyst



Jeff Kagan has been described as the most widely quoted analyst in the telecommunications industry.”

Dick Martin, former EVP of Public Relations at AT&T

Some companies will successfully leverage AI and grow, while others will struggle. Time will reveal who adapts best.

Currently, AT&T and T-Mobile are showing stronger momentum than Verizon. Still, Kagan believes Verizon has the ability to turn performance around under new leadership.

AI can benefit 5G, wireless, and telecom companies in at

least two critical ways:

1. Improving network management, efficiency, and performance.
2. Enabling new solutions for enterprise and corporate customers.

While Verizon remains a leading wireless provider, it has not yet demonstrated sustained growth in recent years.

Kagan believes CEO Dan Schulman has the opportunity to develop creative strategies, address stagnation, and position Verizon for growth.

“We need to give him the time and space required to build momentum and get the ship moving in the right direction again,” Kagan said.

Former AT&T Executive Vice President of Public Relations Dick Martin underscored Kagan’s influence in his book *Tough Calls: AT&T and the Hard Lessons Learned from the Telecom Wars*, writing: “Jeff Kagan has been described as the most widely quoted analyst in the telecommunications industry.”

Kagan has written thousands of columns and articles, translating complex technology trends into clear, practical insights for executives, investors, customers, and employees.

About Jeff Kagan

Jeff Kagan is an Atlanta-based industry analyst, columnist, consultant, influencer, and keynote speaker. For more than 40 years, he has provided analysis and commentary on innovation, market trends, and company performance across wireless, telecom, 5G, 6G, AI, and other high-growth sectors, serving both B2B and B2C markets.

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