

Anywhere

How Global Connectivity Is Revolutionizing The Way We Do Business

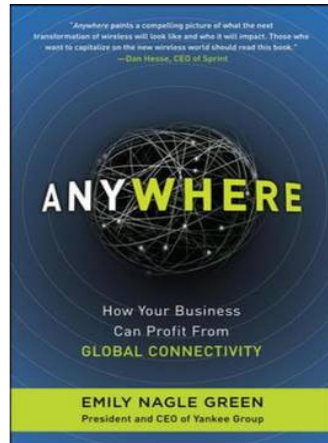
About the Author



Emily Nagle Green is president and chief executive officer of Yankee Group, a global technology research company.

Throughout her varied career as a technology engineer, marketer and researcher, and through her published work and speaking engagements, Emily has become a widely respected thought leader on the impact of connectivity on networks, enterprises and consumers.

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■ The Big Idea

A pill bottle helps health care professionals monitor patients taking medication. A vending machine reports its own inventory over a wireless network. A telephone speeds checkout by acting as a debit card in retail stores around the world.

The future of the world – and business – is ubiquitous connectivity, the total interconnection of people, ideas, and products through a global digital network. As the network grows and the world of data expands, every citizen will have instant access to virtually anything he or she wants.

Where is this network? Anywhere. And you must learn to use it to the fullest if your business is to thrive in the coming years.

The world is charging ahead faster than at any other time in history, and global connectivity will be here sooner than you might think. Trillions of dollars of new value will be created on this worldwide network fabric. Are you moving fast enough?

The survival of your business depends on whether you'll be there to meet it.

Why You Need This Book

This book combines expert insight, tactical tools, and Yankee Group's proprietary data on global connectivity trends, providing what you need to reach the customer of the future... anytime and anywhere.

WELCOME TO ANYWHERE

In the past few years, the global business climate in which we all live and work has changed dramatically. News headlines described rapidly worsening economic conditions, frightening many of us and our leaders. Under the strain, many businesses around the world flagged; some failed. At the same time, it left consumers fearful and unwilling to spend. None of us escaped some form of impact.

All technological changes can carry the world's good or evil along with them. But Anywhere – a powerful revolution of technological and economic forces bringing digital connectivity to all of us and the things we care about – is the printing press, the railroad, the electrification of our cities and towns, the introduction of radio and television, and much more.

It's a set of inexorable changes propelling us forward with tremendous upset and upheaval, on a largely positive path that will lead to growth and exciting new commercial opportunities. It's time to understand what's happening and what you can do to stay ahead of the game.

So let's get started. Welcome to *Anywhere*.

THE EMERGENCE OF THE ANYWHERE NETWORK

These three key factors are combining to form a global communications fabric – an Anywhere Network. They are moving us from a network that appears in some places, at some times, for some people, to a network that is anywhere and everywhere.

What will this network be like? What will it do for us? Almost by definition, this infrastructure will be high in capacity and pervasive. But there are three additional critical qualities that Yankee Group experts expect to emerge along with this ubiquitous network, all of which are important to business people hoping to build profitable endeavors that use it.

1. The Anywhere Network Will Be Seamless

While many of the citizens who join the Anywhere Network for the first time in the years ahead will depend on an exclusively mobile connection, the ideal Anywhere Experience will be one that combines the higher performance of fixed broadband networks with the ubiquity of wireless, allowing us to move around our world without regard to the physical manifestation of the network that supports us in any one location.

2. The Anywhere Network Will Be Secure

To carry the world's digital activities everywhere we need them to go, the Anywhere Network needs to protect its contents, whether they're money, details of sensitive negotiations, commercial secrets like patents and inventions, or just very personal information like medical test results. Today, networks vary in the level of security they provide to the traffic they carry.

3. Finally, the Anywhere Network Will Be Intelligent

Ultimately, as savvy connectivity users, we may choose our network access not based on pervasiveness or reliability – the heart of many network access not based on pervasiveness or reliability – the heart of many network ad themes today – but on the network’s intelligence. Some thoughtful operator will be the first to stake out new marketing territory as the “High IQ Network.”

SEEING THE ANYWHERE CONSUMER OPPORTUNITY

Despite the obvious differences between an Indian street vendor, a couple of Kenyan coffee farmers, a white-collar working mother of three, and a retired Swedish professor, these people do have a common denominator: lives transformed by embracing the connected experience.

In a relatively short time, we see increased economic vitality, better health care, greater life expectancy, and better education – all thanks to connectivity.

For business leaders, there are also some revolutionary opportunities for commercial benefit embedded in these profiles. A few stand out:

First, these consumers have many *more things* in their lives. You probably spotted some of the new electronics that our more well-off consumers talked about: entertainment devices, kitchen appliance, personal care tools, and more. Can your company expand its product offerings and global reach to be in place when consumers in emerging markets can begin to afford a new class of goods?

Second, *commercial payment methods* will look very different across the board and will create market-entry opportunities for new companies. Where consumers don’t have access to conventional banks and credit, they may never develop the habit of using them if the first noncash solutions they’re offered come from other sources.

A third commercial theme ahead is the *expansion of services* to consumers. It's hard to provide services to people who have to walk miles to get to you or who are too infirm to leave their homes to visit your clinic or take in a concert. But when the network has the capacity to deliver complex, multimedia experiences to more devices than just a PC in places we spend time whether that's home or elsewhere, businesses can deliver more services.

Fourth, a more connected future is one with *new distribution solutions* –getting things to buyers in new ways. When retailers can place orders on the spot, getting product to them can be less expensive, since less of it needs to wait in a warehouse or rot on a dock lacking refrigeration.

Finally, if you had your marketing hat on, spot the wealth of potential opportunities to create *more awareness and consideration* of your product or service in the Anywhere futures discussed. Whether it's coupons, or advertisements on the mobile, the connected device that's always in a pocket or purse is a tremendously useful new screen for marketers.

WHO IS ANYWHERE TODAY?

To help clarify each of these distinct consumer segments, we've named the five groups to create intuitive impressions of each segment and how to reach it.

1. **Analogs**

In this revolution, the best way to describe them is to say that they are uninterested in digital technology. Analogs cannot even be called slow followers of our Anywhere trend, since they make the choice to avoid advanced technology altogether. Much of their reluctance may be the result of age; the Analogs are, in terms of average age, the oldest segment.

2. Technophytes

This is a group of consumers who aspire to be considered cutting edge when it comes to technology. In reality, though, they are late followers of digital media and connected devices. Why? Because while they are interested in these technologies, they don't have the disposable income available to buy them until there are mature and more affordable. Technophytes want their Anywhere connections; they just can't afford them until they are mainstream.

3. Digital Shut-ins

This is the group of consumers who have a great interest in digital media in their own homes, but less so when they are away from home. While these consumers enthusiastically embrace digital media, they aren't as aggressive in adopting connected devices. Educating this segment remains important because Shut-ins often fail to equip their devices, such as HDTV, with all the services they support, like HD channel programming from their providers.

4. Outlet Jockeys

Along with consumers in our final segment, Outlet Jockeys own the latest and greatest portable devices and thirst for more of them. These mobile consumers enjoy cutting-edge portable applications as well as using their hand sets to e-mail, instant message, and engage in social networking.

5. Actualized Anywheres

Actualized Anywheres may be the smallest segment, comprising only 5 percent of the population in North America and Western Europe, but they are the most important. They enthusiastically buy Anywhere products and services for their mobile lifestyles, and, unlike Outlet Jockeys, they apply those devices and services at home. Actualized Anywheres bring the concept of a ubiquitously connected consumer to life.

THE ANYWHERE BIG PICTURE

We've used lots of big numbers in talking about the scale of the coming impact of Anywhere – billions of people, trillions of devices, quadrillions of packets flying around the world. Given that, it would be pretty surprising if Anywhere didn't also bring some large implications in our world beyond the commercial opportunities this book has considered.

Our Anywhere future will be dramatically different in economic, social, even moral terms.

The Anywhere Economy

In many respects, Anywhere is all about the money, since ubiquitous connectivity will make it easier for us to share in the world's riches. Behind the profit itself, though, lies an interesting shift in economic power.

Anywhere brings immediate information and options to everyone. In economic terms, it shifts power from the supply side of the market to the demand side. In the Anywhere Economy, customers take control. The Anywhere buyer is empowered both by knowledge and by choice.

The Anywhere Work

Over the centuries, technology has helped automate the largest parts of the workforce: first unskilled labor, then skilled labor in factories, then white-collar workers. Anywhere is the next set of chapters following the shifts from the telegraph, telephone, adding machine, computer and the Internet. Connectivity is allowing us to further automate knowledge work, freeing up yet more potential productivity in the workforce over time.

In the world of work, Anywhere will lead us to a postglobalization business era.

Innovation Comes From Anywhere

The Anywhere Revolution promises not only to preserve that recent shift in early technology adoption from companies to consumers, but to help innovation's pioneering forefront to move from mature markets to emerging markets.

The Anywhere Society

Connectivity is redefining what it means to be alone and to feel alone. Can we be alone when we are constantly connected? Loneliness and isolation will be less about our physical location and more purely about our emotional state.

ANYWHERE: FINAL THOUGHTS

If you manage to keep your firm from talking itself out of concern about the Anywhere Revolution and you come up with some fresh thinking about how to approach it, beware the temptation to try to do it all. Encourage coworkers to think in Anywhere stages, progressively expanding markets, expanding broadband consumption, increasing connectivity-based functionality, and more.

Keep things simple, tee up lots of follow-on possibilities, and let your Anywhere adventures' first successes help shape the best next steps.

That's change advice for your company. As a businessperson, how will you let Anywhere change you? Here are three final thoughts:

1. Be Anywhere Curious

You should develop your keen sense of the strengths and weaknesses of connectivity technologies and what would fit well with your customers' appetites and your enterprise's culture and personality. You can't predict a black swan – but you should be looking for them all the time.

You might not have the confidence borne of Metcalfe's personal successes, but you can still be an eager investigator, avoiding the temptation to write things off

before you've opened your eyes to all the possibilities they offer. Don't let yourself be talked out of powerful ideas.

2. Be an Anywhere Connector

Malcolm Gladwell's book *The Tipping Point* introduced the idea that some people are naturally "connectors," using their links with others to create or promote opportunities between them. Yankee Group analyst Declan Lonergan points out that ubiquitous connectivity might reduce the unique value of Gladwell's original connector-type people because we can all be connectors. If that's true, then Anywhere will force us all to raise our game.

3. Be an Anywhere Thinker

Anywhere enlarges the potential sources of input for virtually all decisions; that should bring tremendous change to how you approach your own thinking and decision making. In medicine, doctors today act based on what they learned in medical school or what they have personally encountered in their practice. Eventually, decision support service providers in medicine will aggregate knowledge based on all known evidence. Any one doctor will be able to know what *all* doctors know.

Operate with enlightened self-interest. What can you do to make the difference between Anywhere good and bad? Be an optimistic adopter of connectivity – promote the positives and push for change. Be an Anywhere evangelist and embrace the Anywhere future that is opening before you.

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