Digital Disruptions: Major Trends Reshaping Companies and Industries

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Bob Hayward

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The Next Big Thing In Business Already Exists!!!

<table>
<thead>
<tr>
<th>CNN's Top 25 Innovations During The Past 25 Years</th>
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<tr>
<td>1. The Internet</td>
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<td>2. Cell phone</td>
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<td>3. Personal computers</td>
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<td>4. Fiber optics</td>
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<td>5. E-mail</td>
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<td>6. Commercialized GPS</td>
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<td>7. Portable computers</td>
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<td>8. Memory storage discs</td>
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<td>9. Consumer level digital camera</td>
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<tr>
<td>10. Radio frequency ID tags</td>
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<td>11. MEMS</td>
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<td>12. DNA fingerprinting</td>
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<td>13. Air bags</td>
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<td>14. ATM</td>
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<td>15. Advanced batteries</td>
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<td>16. Hybrid car</td>
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<td>17. OLEDs</td>
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<td>18. Display panels</td>
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<td>19. HDTV</td>
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<tr>
<td>20. Space shuttle</td>
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<tr>
<td>21. Nanotechnology</td>
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<tr>
<td>22. Flash memory</td>
</tr>
<tr>
<td>23. Voice mail</td>
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<tr>
<td>24. Modern hearing aids</td>
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<td>25. Short Range, High Frequency Radio</td>
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Source: CNN
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Client Issues

1. What is a Digital Business MacroTrend?
2. Which Digital Business MacroTrends will create power shifts by 2010?
3. How will we recognize Digital Business MacroTrends in time to exploit them?
4. What impact will Digital Business MacroTrends have on business and society?
5. Who is taking advantage of these Digital Business MacroTrends and what have they discovered?
What Do We Mean by Digital Business MacroTrend?

- Long-term, deep business change
- Enabled or accelerated by IT
- Shifts power balance
- Materially affects business outcome

Three- to 10-year changes to processes, operating models, industry structures, management methods, core competencies, value propositions...

IT is a catalyst or accelerant of a change for which there is already latent demand or an external force

Although positive sum games may arise, there are usually gainers and losers of power

More than 5% p.a. (+ or -) for a headline measure for more than 25% of organizations

Client Issue: What Is A Digital Business MacroTrend?

Generating electricity via fuel cells is by no means a new idea or innovation (remember the explosion of the oxygen tank component of an Apollo 13 fuel cell in 1970?). Long before that, fuel cell made the news, British scientists William Nicholson and Anthony Carlisle in 1800 identified the process of using electricity to decompose water into hydrogen and oxygen. Then, in 1838, Welsh scientist William Robert Grove Welsh actually created the first fuel cell (a term coined in 1898 by Ludwig Mond and Charles Langer) when he placed a platinum electrode in nitric acid and a zinc electrode in zinc sulfate and was able to generate 12 amps of current at about 1.8 volts. Today, the world's 6.3 billion people demand ever-increasing amounts of energy, and its 600 million cars vie for the 77 million barrels of oil produced each year. However, annual consumption now outpaces annual production and new energy sources, and a barrel of oil can cost more than $60. The most important technology-enabled business change trends behave like this. They play out over time, and it's easy to misjudge which ones matter and when they will matter. Digital business power trends are those in which IT plays a big part; however, other economic trends or social forces must combine with the technology enabler before major power shifts and business changes occur.

Action Item: Set your own threshold value. Determine what you believe to be a material impact on your business. Is a 5 percent shift in sales appropriate? Should it be higher or lower? Is sales the right outcome measure to focus on?
The Search For Trends That Will Change Behavior and Shift Power

What Is a Digital Business MacroTrend?
Many discussions, books, articles or even conferences pertaining to IT contain the overstated notion that “IT has changed everything.” That’s an intriguing notion, but any objective audit of human activity over the past 20 years will reveal that, of course, everything has not changed. Most people in advanced economies still wake up in the morning to an alarm, eat breakfast, commute to work, work for a living, watch TV, read, ride bicycles and so on. Therefore, when choosing likely future Digital Business MacroTrends, we search for those specific activities and chains of activities that will truly cause change in 1) human behavior, 2) business activity, 3) business processes and 4) business benefit (revenue, earnings, market share, and so on). Examples of such changes are depicted above: Unknown millions of hours have been saved since drivers began using radio frequency identification (RFID) toll collection tags. Customers who do not mind self-service treatment in a store can now use scanning devices and automatic payment systems to purchase an array of consumer goods. While cash has not yet been universally replaced by computing-based currency exchange, the manner in which cash is obtained has certainly changed behavior for consumers needing cash and banks wishing to save expense. After saving time by avoiding lines at traffic toll booths, additional time is saved by airline travellers who use check-in kiosks. Self-service has also benefited those who once sat waiting for their vehicles to be refuelled but are now pumping their own fuel.

Action Item: Audit your current daily activities and predict which new activities will emerge vs. those altered, or gone in 20 years.
What Is a Digital Business MacroTrend?

In recent years, IT’s reputation has taken a battering from business leaders. Big projects and spending between 1998 and 2002 did not produce the quick business returns “promised” by the IT industry. During the economic trough, many IT budgets and project plans were cut back. Businesses lost faith in the link between IT investment and business growth. The Harvard Business review 2003 article “IT Doesn’t Matter Anymore,” reflected the mood. However, demand for IT is now in recovery. Surveys show CEOs put growth plans back at the top of their agendas in 2004 and 2005. These plans require systems changes to be executed successfully. Results from the worldwide Gartner EXP Survey of 1,400 CIOs (conducted in 4Q04) showed optimism that IT budgets and spending will increase again in 2005. A 4Q04 survey by the Economist Intelligence unit indicates that CEOs and senior business executives view technology as a "critical change forces acting on global markets." CEOs seem more confident about strategic business change, but economists’ confidence is waning and GDP growth is slowing.

Real GDP Annual Growth (%)  

<table>
<thead>
<tr>
<th>Year</th>
<th>Americas</th>
<th>Europe, Middle East and Africa</th>
<th>Japan and Asia/Pacific</th>
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<tbody>
<tr>
<td>2004</td>
<td>4.5%</td>
<td>3.0%</td>
<td>4.6%</td>
</tr>
<tr>
<td>2005</td>
<td>3.8%</td>
<td>2.7%</td>
<td>3.3%</td>
</tr>
<tr>
<td>2006</td>
<td>3.1%</td>
<td>2.8%</td>
<td>3.9%</td>
</tr>
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(source: Global Insight March 2005)

**Action Item:** Propose precise ways IT-enabled change can help the CEO meet stated growth targets.
Client Issue: Which Digital Business MacroTrends will create power shifts by 2010?

Strategic Planning Assumption: Digital Business MacroTrends will force operating model changes in every industry segment by 2015 (0.7 probability).

Digital Business MacroTrends

**Global micro business** — C.K. Prahlahad, among others, predicts large numbers of low-income individuals are set to become consumers in emerging economies. Ecosystems of small businesses serving these consumers will be accessible via the mass adoption of the Web and mobile telephony in nations such as India. These new markets have great potential, but market behavior and consumer needs will be counter-intuitively challenging.

“Greenfield” — New business opportunities emerge as the business application technologies of the Internet era mature and integrate and far more-effective business operating models become possible. In oligopolistic markets, the gap between the “industry standard way” and the new opportunity is often first breached by a “greenfield start-up overcoming legacy thinking and systems. Examples are visible in travel (JetBlue Airways), grocery (FreshDirect), finance (ING Direct) and software (salesforce.com).

**Proactive transparency** — Technology is foisting transparency on companies faster than most can adjust to. Calls, documents, e-mail and camera images are captured by devices, archived on inexpensive storage and are readily accessible. It becomes hard to keep business secrets. Capital extracts a premium for the risk implied by any opacity. Understanding and proactively engaging this force can confer competitive advantage via brand trust, cost of finance and attracting staff.

**Design innovation** — Creative design became a potent force in the 1990s. Combining aesthetic design with IT will be a major source of customer value and market disruption in the coming decade, as the Apple iPod example has demonstrated. IT/ design combinations will be applied first in products, but later in service and experience design.
Which Digital Business MacroTrends will create power shifts by 2010?

**Projectized enterprise** — Globalization and transparency speed up markets. Businesses must undertake more frequent change to keep pace. The role of management is in transition. Changing the business "engine" is the incessant primary focus. New organizations, governance and tools for project portfolio management are evolving. Early mastery is culturally challenging, but it has high disruptive value potential.

**Social information analysis** — Through the 1990s, analytical tools applied to warehouses of historical transactional data helped evolve new disciplines, such as customer relationship management (CRM). Since about 1995, mass social discourse in e-mail, calendars, contact lists, IM conversation, text messages, and so forth, has been accreting the next data gold mine. Sales contact networking and consumer market behavior are early opportunities. Knowledge work process understanding is another key prize.

**Regulatory disruption** — CEOs report that the rapid increase in the number and complexity of regulations companies must meet is becoming a significant business challenge. This will persist because regulators have been made far more efficient by use of Internet technologies. New opportunity arises from thriving on regulatory disruption with policy formulation and compliance as process centric, IT-supported knowledge work disciplines.

**MAD modularity** — Resurgence of merger acquisition and divestiture activity, especially via private equity, is a consequence of IT accelerated transparency. This spin-out, buy-back and joint venture "creative destruction" will thrive where business architectures support modular separation and recombination.
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Strategic Planning Assumption: From 2000 through 2050, public pension spending as a percentage of GDP will range from 6% to 5% in the U.K., 5% to 7% in the U.S., 8% to 17% in Japan and 12% to 19% in France. (Source: OECD 2001).

Which Digital Business MacroTrends will create power shifts by 2010?

Real-time enterprise — Recent research reveals that every disruptive, and even destructive, business surprise arrives with an adequate prior warning. This finding leads us to conclude there is no such thing as a legitimate business surprise. As a result, we believe clients must expand the vision of their IT investments by going well beyond enabling businesses to respond faster (for example agile enterprise), to detecting potentially harmful or favorable business events as they occur or before they occur.

Productivity — Of the 30 largest world economies, the largest component of economic activity is derived from services, not manufacturing. But, as IT continues to enable workers to produce more within a specified period, evidence suggests that the era of IT-caused productivity growth may be ending. We are searching for business and IT leaders who will find new ways for IT to contribute to business growth.

Dynamic business — After centuries of employing fixed price cost methods in wholesale and, especially, retail, IT will soon allow businesses to change the price of a product at shelf level when conditions warrant.

Aging — In 1950, only eight out of 100 people on earth were 60 years old or older. In 2050, U.N. population experts predict that 21 out of 100 will be 60 years old or older. We continue to search for the profound shifts in business, society, government, healthcare, and housing that must occur to accommodate a steadily aging population.

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Client Issue: How will we recognize Digital Business MacroTrends in time to exploit them?

Strategic Imperative: When mature consumer markets stagnate, business planners must innovate and scour the globe for new growth opportunities, including those where IT is a change catalyst.

Globalized Micro-Business

TREND: Global communications are penetrating low-income populations, helping turn them into addressable markets.

- Large low-income populations have been economically inaccessible
- Micro-finance loans (e.g., $70) can break the poverty trap, creating markets of micro-consumers
- Local micro-markets are developed by community organizations
- Pay per use products and prices serve market needs

Multinational consumer product and service organizations can find growth difficult in home markets. Relatively wealthy consumers are reaching their saturation point. Breakthrough thinking during the past few years suggests developing the world's poorest communities into mass consumer markets. Experiments show that billions of people who live on less than $2 a day want to be served if products and services are relevant and affordable. The key to unlocking this huge market potential is cost-effectively reaching and serving poor consumers in remote locations. The penetration and reach of IT in developing countries is a crucial enabler. C.K. Prahalad has thrown a spotlight on this debate among global business leaders and strategists with his 2004 work, "The Fortune at the Bottom of the Pyramid." Vinod Khosla, influential venture capitalist and co-founder of Sun, has been expanding on these views, particularly in financial services. Individuals and small villages, given access to modest amounts of loan capital, can start their own small distribution businesses that work symbiotically with the interests of multinational corporations. Companies such as Proctor & Gamble and Vodafone show that poor consumers can be addressed, although many assumptions about market developments must be changed. Global business development organizations are actively promoting this market evolution agenda. It's not philanthropy or corporate social responsibility. It's about market co-development based on the enlightened self-interests of the poor in emerging markets and the world's large corporations. In mid-2004, Unilever announced that it would invest about $500 million to develop its share of the food, beverage and cosmetics markets in Indonesia during the next 10 years (source: Hoovers).
How will we recognize Digital Business MacroTrends in time to exploit them?

In 1990, the world's nations imported $3.5 trillion in goods and services from all other nations. In 2003, (the most-recent year with complete results) that figure reached $10 trillion. However, in 1990, more than 300 countries and territories (also known as "emerging economies") accounting for 29 percent of the world's imports, with the remainder imported by just 24 "developed economies." In 2003, the value of imports purchased by emerging economies expanded from $1 trillion in 1990 to $4 trillion in 2003, and worldwide share of all goods and services imported by the emerging economies grew from 29 percent in 1990 to 40 percent in 2003. While scores of social, government, economic and cultural issues must be altered to encourage further economic expansion in emerging economies, it is clear that the pace of importing by so many emerging nations is rising. According to C.K. Prahalad's book, "The Fortune at the Bottom of the Pyramid," "The 18 largest emerging and transition countries include 680 million such households, with a total annual income of $1.7 trillion — roughly equal to Germany's annual gross domestic product. Brazil's poorest citizens comprise nearly 25 million households with a total annual income of $73 billion. India has 171 million poor households with a combined $378 billion in income. China's poor residents account for 286 million households with a combined annual income of $691 billion.

**Action Item:** Aggressively lobby to become a key contributor to any strategy development efforts focusing on "emerging economies".
Strategic Imperative: IT tracks, records, stores and exchanges business information fast, in great detail and at a low cost. Business and IT leaders must master and exploit the powerful economic transparency forces this creates.

TREND: Businesses are sharing more information publicly, more quickly.

Some have to learn about transparency the hard way

Technology is still accelerating transparency

Computer forensics make it harder to hide the truth

Power shifts to those who learn to thrive in a more open world

The need to compete for capital moves transparency to the front foot

Business Actors

Louis Matherne, Ward Cunningham, Ben Allen, U.S. SEC, Rangaswami

How will we recognize Digital Business MacroTrends in time to exploit them?

You can't hide business secrets anymore. Think about the the Andersen and Enron case, with staff desperately trying to shred paper records, and the court case turning on one e-mail. Think of the desperate managers at Parmalat who reportedly tried to smash hard drives with hammers. You can't erase the information. Perhaps we can find ways to contain e-mail, manage access to our intranet or find ways to "lose" backups. Yet, the technologies that accelerate transparency are mushrooming. Text messaging, instant messaging, blogging, camera phones and USB memory keys have all seen explosive business growth but are seldom fully under corporate policy control. Even where locked doors, metal detectors and draconian policy enforcement exist, information leaks. Do your offices have lead-lined walls to prevent wireless LAN eavesdropping? Do you erase hard drives so completely that digital forensics companies cannot read the echoes on the track edges? Digital transparency has crept up on business during the past five-to-seven years. It is irreversible and transformational. Innovators are leveraging the trend as a competitive weapon. A clear example is open source, through which powerful new models for business value creation have been developed. For public corporations, the globalization of capital flows requires increased information disclosure. To compete for capital, you must reduce risk to the lenders by keeping them better informed. Louis Matherne spent several years heading XBRL.org to create standards for more open financial report information exchange. Meanwhile, the U.S. SEC has been creating the stick to go alongside the carrot (for example, the rules enforcing Sarbanes-Oxley section 409 requiring electronic public disclosure of a number of material business events within four working days of their occurrence).
Strategic Imperative: Organizations in advanced economies must find better models and ways to measure how value is created to manage production effectively.

Economists measures are too abstract for effective management. But industrial era measures and methods simply won't do anymore. The IT industry is funding business academic research. Partly because newer technologies can be hard to justify. Our economies continue to become more dependant on information work. But 'brute force' productivity gains will continue in the interim.

How will we recognize Digital Business MacroTrends in time to exploit them?

Economists and accountants understand factory output, but struggle to measure information-age output. Clients often have sound business intuitive reasons for making new IT investments, but have a hard task defining the contribution and measuring the value. Imagine justifying a $5 million investment in a better system that enables creative collaboration, allows richer interaction, but costs $10 million. Going for the better system would most likely be a matter of faith and intuitive judgement. We have poor understanding of how information and knowledge work progresses and crude measurements of the outputs and their value. We can value a brick or a ball bearing anywhere, but what is the value of the IT applications your company built in 2000 or of the analysis your company has of the new market it entered two years ago? Many people are actively attacking this problem from different angles. John Seely Brown's work on the social life of information opens up analysis of the way information networks facilitate and improve the human discourse of knowledge work. Jeff Railes of Microsoft heads up the Information Work Productivity Institute that supports research work to make progress in information work measurement. Radhakrishnan and Lev are working to progress the valuation of intangible assets in accounting, and Eric Brynjolfsson's work establishes links between IT investment and business output. Yet, progress in these research areas is not rapid. During the next few years, "brute force" methods of improving information work productivity without understanding it better will still lead to progress. For example, inexpensive, large desktop displays will allow workers to do more work in a given time period, assuming what they do adds value!
How will we recognize Digital Business MacroTrends in time to exploit them?

Productivity is often depicted as a relationship between business output and business input. If productivity (output) per worker increases, inflationary concerns diminish, because wage increases can be offset by increased prices or sales. However, if wages grow faster than sales, company costs increase, money supplies increase and inflation pressures cause central banks to raise interest rates. As a result, the more money costs to borrow, the more difficult it is for businesses to afford new capital to expand. Recent U.S. productivity performance shows output per hour increasing up to 2003. However, results since 4Q03 show the rate of productivity growth slowing compared with 1Q96 through 4Q03. The individual job titles that roll-up to each of the five highlighted segments suggest that millions of workers may be engaged in occupational roles quite ready for increased levels of automation and efficiency (for example, 200,000 payroll clerks, 1.7 million bookkeeping clerks.)

**Action Items** IT professionals wishing to remain employable must initiate and lead future efforts to bring a next generation of IT delivered productivity to their organizations. A place to start is to: 1) identify individual job classifications by your employer, 2) conduct a preliminary review that combines a knowledge of one's organization, the titles identified and advancements in IT products and services, 3) create a list of no more than 20 of the most populous job functions and 4) distil that list to no more than five job titles that could be significantly enhanced / replaced by IT-enhanced business processes.

**Strategic Planning Assumption:** By 2015, five times as many jobs will be lost from productivity improvements than from sourcing (0.7 probability).
Real Time Enterprise

TREND: Every Business Surprise Arrives With Adequate Advanced Warning.

How will we recognize Digital Business MacroTrends in time to exploit them?

In March 2004, we concluded a significant adjustment and update to the October 2002, real-time enterprise (RTE) definition was warranted. Therefore, the updated definition states: "The RTE monitors, captures and analyzes root causes and overt events that are critical to the success of a company at the moment those events occur. RTEs will then exploit that information to progressively remove delays to the management and execution of critical business processes." Gartner also published the results of a five-year research study dealing with the nature of business surprises. The study involved the detailed examination of the prevailing conditions that preceded bankruptcies, cases of missed quarterly earnings, shareholder lawsuits, and Securities and Exchange Commission findings. The following are the findings and brief explanations: 1. Prior to any business mishap, there is always warning. 2. You need to monitor, capture and analyze very little information in real time to uncover opportunities and/or stay out of trouble. 3. Every RTE has a real-time "champion." Every time we found an RTE, we found one person who drove the enterprise to become an RTE. 4. The real-time champion always has an "epiphanic" moment. RTEs do not evolve naturally. Something always triggers the need to evolve into one. 5. CEOs want real-time information. They told us repeatedly what information they wanted in real time and how such information would enable them to run their companies far more effectively.
How will we recognize Digital Business MacroTrends in time to exploit them?

Our fifth RTE research finding stated that senior executives want real-time information. During our RTE research project, we were continually surprised by the number of CEOs who were immediately able to tell us exactly what kind of information they wanted to receive in real time to help them run their companies more effectively. However, equally surprising (and seemingly incongruent with their occupations), is the belief among many IT professionals that senior executive should not focus on real-time information at all, or on any other matters of near-term concern. Some IT professionals have been quite strident in their anti-real-time beliefs through statements such as, "[CEOs] wouldn't know what to do with the real-time information, even if I gave it to them." Clients should connect our findings that CEOs want real-time information with the results from our 2003 GartnerG2/Forbes survey, which found that many CEOs view IT as an obstacle to change. Enabling real-time detection of potentially harmful business events is likely to become IT's next significant contribution to business. However, these gains can be achieved only if genuine or perceived obstacles to real-time adoption are identified in advance and dealt with directly and thoroughly.

**Action Item:** Identify the internal and external constituencies that are most likely to resist real-time adoption and develop an in-depth assessment of the causes and remedies for this resistance.
Tactical Guideline: Business leaders, IT leaders and strategic planners should select a few key trends that can be linked to create powerful synergies and evolve new, strategic business disciplines.

### Power Trend Interactions

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<thead>
<tr>
<th>Digital Business Macro-Trends</th>
<th>Design innovation</th>
<th>Globalized microbusiness</th>
<th>Proactive Transparency</th>
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<td></td>
<td>Business Greenfielding</td>
<td>I-work Productivity</td>
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<td>Design Engineering</td>
<td>Geosourcing innovation</td>
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<td></td>
<td>Business model efficiencies</td>
<td>Information work discoveries</td>
<td>Rights and responsibilities</td>
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</tbody>
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### Enabling Technology Trends

- Storage
- Channels
- Metadata
- Mobiles
- Broadband
- Web Users
- Graphics
- Social Software
- Process Management
- SOA
- Utility Infrastructure
- Displays
- Wireless Devices
- Processor

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How can we ensure we recognize the trends that will change our business in time to exploit them?

What made customer relationship management (CRM) possible? There was pent-up commercial demand to understand and treat customers better. There was progress in relational database technology, storage costs and interactive channels, such as call center and the Web, which provided the elements for creating a strategic business discipline. CRM is not just a technology or even a collection of technologies; it is a set of business competencies that must be deeply assimilated by an organization so that it can gain advantage from it. Sometimes that advantage can be sustainable for a while because few manage to establish the culture, organization, process and business skill changes needed. You can buy a customer database system off the shelf, but not the sort of excellence in CRM that differentiates a business. So where will the next CRM, ERP or product life cycle management (PLM) come from? Some are illustrated in this chart. Often, the most valuable possibilities arise where trends can join to create synergies. Perhaps social analytics and better measures of information work contributions to business outcomes will allow for some design activities to become more engineered and predictable rather than artistic and creative (and thus sometimes higher risk/failure rate). With the effects of transparency penetrating commercial organizations, who has the right to say yes or disclose information becomes a difficult issue. Again, perhaps better analysis of organization networks will support the management of rights and responsibilities in this area. If we learn more about how individuals contribute effectively to information work outcomes, we may be able to break down the structure of the work better and source the different parts more effectively across the globe, taking better advantage of world-class skills and lowest costs more efficiently.

**Action Item:** Identify and research two MacroTrends that would yield financial rewards for your organization.
How can we ensure we recognize the trends that will change our business in time to exploit them?

If a trend moves power from one group to another in a domain that affects your business, take note, otherwise ignore it. Never forget that a technology-enabled trend doesn't assure success. Some underlying economic force must exist to forward the trend. Your judgement about how powerful that force is in domains that affect your business will help determine how important the trend might be. Social analytics will allow people to better understand the dynamics of this powerful economic engine. Those who create or contribute to new knowledge will be more identifiable and attributable. Power may shift toward these nodes in the value-creating network. In advanced, wealthy economies, many consumer needs are saturated. Yet, human wants for basics, such as nutrition and cleanliness, are powerful demands elsewhere. So in consumer industries, power may shift toward organizations that harness microbusiness to unlock the power of emerging markets. Meeting consumer aesthetic needs is valuable, so power shifts toward those who understand how to cultivate and manage complex, multidisciplinary teams of artists, engineers and physical/social scientists. The need to manage risk is fundamental to ensuring profits. Using transparency proactively allows for the transfer and reduction of risks, but only open management cultures will be able to take the often-counterintuitive disclosure decisions that transparency forces. Power will shift to those who can muster the culture change. Managing cost to win customers on price requires operational excellence. A new level of this value discipline will arise as management uncovers the models and measures of information work productivity. Finally, the economic force of creative destruction — markets evolve as companies are born, grow and die — benefits technology-competent disruptors.
Recommendations

1. Conclude their implications over six to eight years, then work back to three years.
2. Conclude their implications over six to eight years, then work back to three years.
3. Take those observations into tri-partite conversation.
4. Identify and research two Digital Business MacroTrends that would yield significant financial rewards for your organizations.
5. What steps should you take over 18 months to address the three-year horizon?
6. Take those steps into 2006 portfolio planning
This is the end of this presentation. Click anywhere to continue.