

A hand in a dark suit sleeve holds a glowing, digital cityscape with various skyscrapers and structures in shades of blue and white. The background is dark and out of focus.


Digital Transformation of Industries

Frost and Sullivan Value Proposition

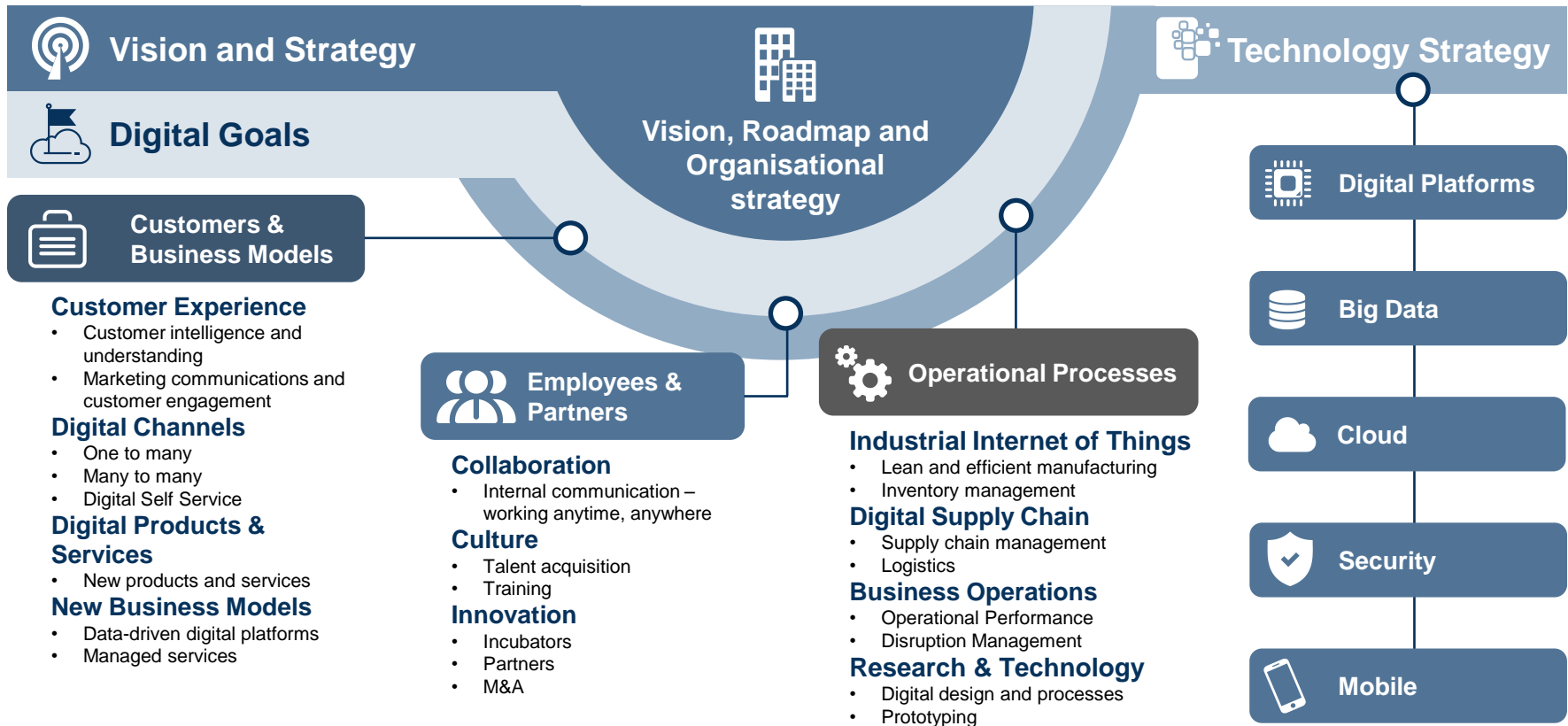
November 2017

Summary

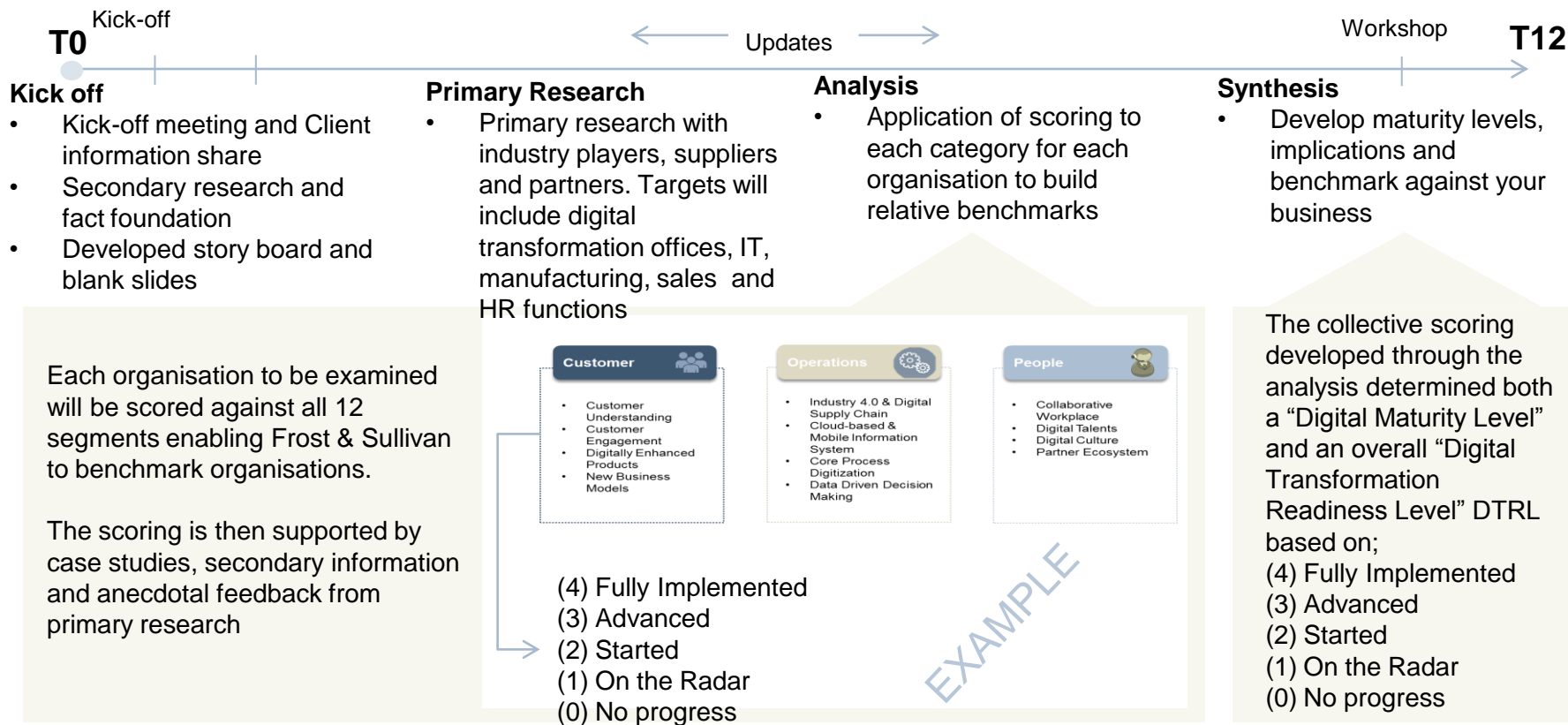
- Many organisations are currently on a Digital Transformation journey which encompasses their people, operations and customers.
- To better understand how your approach scores against your peers and to gain greater insight into the “digital readiness level” of your industry peers, Frost & Sullivan has developed a proven project approach to deliver important intelligence and insight

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- 1. Assess the digital strategies of your leading competitors/peers**
 - Key strategies
 - Examples related to operations, business and customers
 - 2. Benchmark the “digital readiness level” of each organisation**
 - Score and benchmark organisations according to key criteria

Digital Transformation will have a Profound Impact on Customer Interaction, Operational Performance and People



A mixed methodology to generate the required insight for your organisation



Methodology

The Digital Transformation Readiness Level (DTRL) Scoring is completed through synthesising data from multiple sources and is captured through the following:

Stage 1: Filtration of all information and synthesis of the information sources:

- **Secondary research** - any press releases or open source intelligence indicating DT plans.
- **Primary research** – Through interviews with personnel in the companies responsible for DT to understand road map
- **Conference Presentations** – Any specific presentations on DT plans
- **Recruitment indications** - recruitment of specific digital transformation roles, other roles that include DT aspects
- **Company Presentations** – Strategy documents or corporate presentations

Stage 2: Analysis of the relevant case studies for each company including scoring of DTRL level, maturity and strategy behind the digital implementation.

Stage 3: Internal Frost & Sullivan workshop with project team to debate and agree scoring for Customer, Operations and People through analysis of information and Frost & Sullivan knowledge of the customers' market.

Score	Level	Description
4	Fully Implemented	Programme is part of everyday operations and has been fully rolled out
3	Advanced	Programme rolled out with investment made. Operation could be in early stages or not yet fully deployed.
2	Started	Strategy has been approved but further planning or investment required. This could be with regard to reorganisation within a unit or prototyping a new digital product.
1	On the radar	DT is being discussed and considered. Products or internal process may be at concept stage.
0	No Progress	No specific mention or consideration within the company

Methodology (Case Studies)

The methodology to give a DTRL score to each case study is determined on a case by case basis. This was based on whether the DT case study was changing internal operations and processes or was externally focused on customers or partners. The DT segments could be broadly split as follows:

Internal – Customer Understanding, Operations, Collaborative Workplace, Digital Talents, Digital Culture

External - Customer Engagement, Digitally Enhanced Products, New Business Models, Partner Eco System

The table below outlines the description for each level which is in line with the overall DTRL scoring.

Score	Level	Internal	External
4	Fully Implemented	<ul style="list-style-type: none"> Programme is part of everyday operations and has been fully rolled out within the division or across the company. 	<ul style="list-style-type: none"> New digital products/ services / business models has been marketed and sold to customers. Partnership / Acquisition is complete and operations and offerings have been merged.
3	Advanced	<ul style="list-style-type: none"> Programme rolled out with investment made, early operation 	<ul style="list-style-type: none"> New digital products/ services / business models has been marketed and ready, but no indication of a sale to customers. Partnerships and acquisitions in advanced stages with completion expected.
2	Started	<ul style="list-style-type: none"> Strategy has been approved but further planning or investment required. 	<ul style="list-style-type: none"> Product / service / business model in concept stage. Discussion of partnerships / acquisitions
1	On the radar	<ul style="list-style-type: none"> DT is being discussed and considered 	<ul style="list-style-type: none"> New digital products/ services / business models or partnerships being explored
0	No Progress	<ul style="list-style-type: none"> No specific mention or consideration within the company 	<ul style="list-style-type: none"> No specific mention or consideration within the company

Digital Transformation Challenges



Vision and Strategy

How will mega trends shape my digital future?
What is my vision?
What is the the organisational roadmap?
What are my digital KPI's
What are my investment priorities?
What's the ROI on my investment?



Digital Goals

What are my goals?
What is my roadmap?
What is best practice?
What are my competitors doing?
Who do I partner with?
How do I implement?



Technology Strategy

What is my technology roadmap to support the business requirements?
Who do I partner with?



How do we help clients?

Frost & Sullivan Knowledge, Tools and Experience



Strategic Challenges

Market Positioning

Digital Audit and Benchmark

Strategic Planning

Implementation

Communication and Awareness

Organisational Questions

What is industry best practice and how do we rank?

How do we structure our business?

How do I raise my profile as a digital company?

What innovation hub and accelerators do we need?

How do I raise my profile as a digital company?

Frost & Sullivan Services

- Opportunity identification
- Competitive intelligence
- Customer requirements
- Partner ecosystem
- Technology roadmaps

- Audit of internal digital status
- Competitive Benchmarking
- Industry Best Practice

- Opportunity prioritisation
- Business case development
- Visioning
- Roadmaps

- Internal alignment
- Program roll-out
- Internal training
- Implementation

- Thought leadership communication
- Customer engagement

Recent Research Titles and our Digital Transformation Consulting Expertise



Digital Transformation of Industries Programme

Example 2016 Published Deliverables

Syndicated
Research

- Digital Transformation in the Global Education Sector
- Digital Transformation in the Global Food & Agriculture Market
- Digital Disruption in the Global Financial Services Sector
- Growth Opportunities in the APAC Fintech Market
- ICT Spending in Connected Industries: A European SME Perspective
- Internet of Things in Connected Agriculture
- Analysis of Asia-Pacific Internet of Things in the Home
- Blockchain Applications in the Healthcare Industry
- Blockchain Applications in the Energy Sector
- Convergence of Artificial Intelligence (AI) and Agriculture
- Convergence of Artificial Intelligence (AI) and the Finance Industry
- Navigating an Era of Digital Transformation in Europe: A Customer Perspective
- Navigating Digital Transformation in Vertical Markets: A Customer Perspective. Specific studies for:

Digital Transformation of Industries Programme

Example 2016 Published Deliverables (continued)

Syndicated
Research

- Big Data Analytics in Europe's Public Sector
- Wearable Technologies in Sports
- Digital Transformation of Industries Insight: ICT Opportunities in the Global Building Automation Market
- Digital Transformation of Industries Insight: ICT Opportunities in Industrial Automation Industry
- Global Public Safety Networks Market, Forecast to 2020
- Real-time Cities: Second Wave Cities
- Real-time Cities and Open Data 2.0—A Step towards Tangible Outcomes and Viable Economic Models
- Open Data Strategies in Real-time Cities—Cambridge (UK) and Kazan (Russia)
- Executive Analysis of Self-learning Artificial Intelligence in Cars, Forecast to 2025
- Autonomous Robotics, Artificial Intelligence (AI), Blockchains, Drones, Augmented and Virtual Reality Disrupting Industries Worldwide

Digital Transformation of Industries Programme

Example Planned 2017 Deliverables, Europe

Syndicated
Research

- Digital Transformation in the Automotive Sector
 - Digital Transformation in the Retail Sector
 - Game Changing Technologies: A Vertical Market Perspective
 - Growth Opportunities in Artificial Intelligence
 - Blockchain Start-up Activity Heat Map
 - 2017 Virtual Reality Landscape
 - 2017 Augmented Reality Landscape
 - ICT Spending by Industries in Europe - Updating ICT Adoption Trends in Europe
 - Digital Transformation Insight Series: ICT Opportunities in the Healthcare Sector
 - Real-Time Cities: Further Waves Building Up - 3 European Capitals
 - Real-time Cities - Deployment Heat Map 2016
 - The Role of Artificial Intelligence in the Retail Sector
 - Outlook for New Business Models and Consumer Driven Strategies in Digital Consumer Lifestyle
 - Tracking Utilities' Journey to Data Centric Energy Service Companies
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Contact Details for more information...

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