

#MobileGameChangers

Mobile is no longer about devices or locations, it's a way of life and a business model in itself

Customer empowerment is transforming the mobile industry, fast

Leadership must change to keep up

Innovation is dead, long live the customer

Mobile is no longer a device or situation, it's a way of life and a business model in itself.

New research by Russell Reynolds looks specifically at the touch points where individuals meet organisations. It uncovers the drivers, universal business issues and resulting talent needs that organisations face in order to understand and succeed in this brave new world.

The first decade of the 21st century was dominated by connectivity and device innovation. In our connected world, it's already possible to know who we are, where we are, who we're with, who we know, what's around, what we like – and what we'll probably do next. As mobile becomes synonymous with identity, the future will be about application of technology and context– creating new customer experiences, breaking down barriers and transforming business models.

A new form of leadership is needed to keep pace. The leadership model needed through this era of disruption is based around understanding customers intimately, exploiting the opportunities of digital, partnering adventurously, taking risks and coping with chaos.



Welcome to
#MobileGameChangers 2014

Beware your amplified customer

As consumers, we can now access the data we want about people, products and services, wherever and whenever we need it.

Amplification is about the voice and knowledge of the individual.

We're all increasingly in control of what we know and share about organisations. We have the power to cut organisations out of our lives, bypass advertising and seek information from our sources of choice.

We have the tools to amplify our voices in a more powerful way than ever before.

As business becomes driven more and more by customers, the successful leaders will be people who are comfortable with making sense of what can seem like chaos to others.



“The critical question you need to ask is: ‘Is this needed for the relationship with my customer?’ and change the culture and capability to meet this”

Maximo Ibarra
CEO Wind

Barriers broken, possibilities unlimited

Mobile is side-stepping familiar business models and creating new ones – new ways of thinking, new brands and new competition

We don't need a bookshop to buy books. We don't need a school to learn, or banks to pay someone, or a phone number to stay in contact. We don't even need a marketing budget to create a brand.

The pace of this change means that the start-ups of today are the scale organisations of tomorrow. Established players need to adopt the start-up mentality of their new competitors

Barriers to entry in many industries have fallen away. New business models appearing every day to challenge existing ones and force organisations to change more rapidly than ever just to stand still. The meaning of creating value shifts as consumers change what they see value in.

The leaders who are redefining industries have a different view on risk and partnering. The first question these leaders are asking is “what is the upside and what can we create together?”

“We shouldn't expect tomorrow's trends to come from the same old places. The fastest growing markets for smart devices are Africa and Asia. There is every reason to believe – whether it's smart lifestyle trends or distance learning – we will see new trends coming from these markets”

William Plummer
VP External Affairs – Huawei

Data, data everywhere

There is a race between consumers and organisations to understand and use data to create context, with huge rewards for the winners.

Use of data will differentiate organisations. But more data brings more risk. Not just from the amount of data that can be held on an organisation or individual, but on using that data appropriately.

As individuals appreciate the power and value their own personal data gives them, they will want more in return for giving it away.

Trust in organisations also becomes critical – and breaches in trust can destroy relationships between individuals and organisations.

Leaders with the attributes required to navigate this new customer empowered and data driven market are a scarce commodity. Most have worked across different markets, different functions and different industries to build this experience.



“The rule is that if you don’t want your customers to know what you’re doing, then you shouldn’t be doing it”

Ije Nwokorie
Managing Director Wolff Olins

Finding #MobileGameChangers

Game changers are both born and made. They combine a unique set of styles and behaviours with experiences that help shape industries, transform consumer experience and change lives.

Game changers are rule breakers who challenge existing models. They're comfortable in chaos, taking calculated risks in new environments. They're often able to break down functional boundaries and demonstrate exceptional empathy to sustain trust, even in the face of failure. They can create a legacy that defies industry norms.

Game changers are often shaped by experiences across multiple segments and varying scales. They've usually delivered growth through innovative models, in various roles requiring commercial acumen. They combine a natural understanding of their own business drivers with those of their partners in the relevant eco-system.

“Both the person and the organisation must be willing to try. What I mean by this is really get their hands dirty and work bottom-up across organisations to build real solutions. Arriving in the market at scale is virtually impossible”

Kavita Prakash-Mani
Head of Food Security
Syngenta

With thanks to our contributors:



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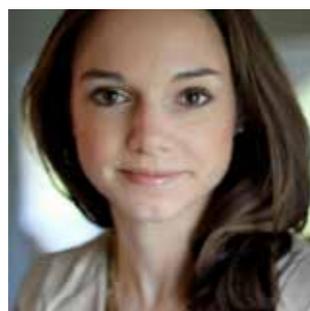
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David Sear
CEO, WEVE



Andrew Fisher
Executive Chairman, Shazam

#MobileGameChangers

We've talked to the current crop of **MobileGameChangers** about the key issues and drivers of success in a mobile world – and the talent that organisations require to harness its potential.

We hope the results of our **MobileGameChangers** conversations inform and inspire. >>

Innovation is dead, long live the customer

The first decade of the 21st century was dominated by connectivity and device innovation. In a connected world, it's already possible to know who we are, where we are, who we're with, who we know, what's around us, what we like – and what we'll probably do next.

As mobile becomes synonymous with identity, the future of mobile will be about application and delivery – creating new customer experiences, breaking down barriers and transforming traditional business models.

“mobile is becoming part of people's identity”

Changing lives in a changing world

Kahina Van Dyke Mastercard

Today, people are managing their lives through their mobile. But this is different across the world. If you look at Nigeria, Mexico, Saudi Arabia or Chile, mobile is facilitating commerce and ecommerce. Plastic isn't dead, but in some markets mobile is leapfrogging this as the default route to payments. Once someone has a phone in their hands, they have an identity and can be a consumer.

In economies like Nigeria, you have a government who are not even sure of their population size or demographics. Forget about credit, it's a huge barrier to their economy. They need this data to properly plan for infrastructure and public services. Other markets like Egypt, where only around 10% of the population are banked – it's markets like these where mobile can become the default means of commerce.

That's a stark contrast to the developed economies where you have a really crowded market space. The change is different there, and you see in the UK the operators coming together to create WEVE (created to accelerate mobile marketing and wallet services) because they didn't want to build everything independently.

Martin Ott Facebook

In non-developed countries [mobile] is actually bringing people online for the first time, making access affordable and making the Internet a tool for information at their fingertips. This will spur a lot of innovation, making them part of a larger economy that will hopefully drive a lot of fundamental change and growth in those economies. That's a much bigger change than an increased usability or more speed for smart phones in

the UK or Germany. It does have an impact on our life.

Iris Lapinski CDI Apps For Good

The thing about mobile over tablet or laptop is that it's very personal. Even in emerging economies, devices are now rarely shared whereas in households a tablet or laptop may be accessed by lots of different people. Following on from that, a mobile is becoming part of people's identity. In Africa for example, people were buying 3G phones ahead of their being a 3G network. This isn't future planning, it's a status symbol of what you can afford and who you are.

William Plummer Huawei

We're graduating from an era of personal computers to personal companions. In the emerging world of the Internet of things, your mobile device is becoming a remote control for your life. It's no longer just about music and gaming and cashless pockets and touch-to-act transactions and anytime, anywhere social networking and augmented reality – although none of that will go away and all of it will evolve. It's now about life management.

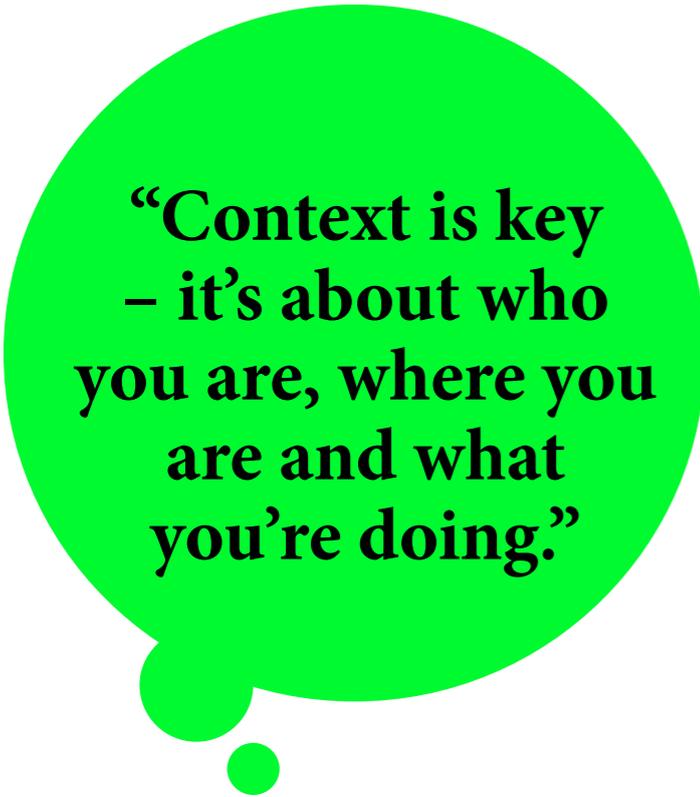
Imagine a situation where it's Sunday night, you set your alarm for 6:30am and go to sleep. During the night, a storm hits and so your device knows this through the weather service and sets your alarm 30 minutes earlier. It also sets the coffee machine to come on at 5:45 so you have a cup of coffee waiting. It also reaches out and taps your car's telematics system, which reprograms your route around storm-related hazards, and, finally, because the temperature dropped, the boiler kicks on 15 minutes earlier too.

Now add to this the possibilities of cloud – apps and services that are too powerful to run on mobiles will migrate to the cloud, delivering a quasi-supercomputer experience on your device. This will also lead to a new era of form factor, modularization, wearable devices and – in order to deliver truly rich multimedia beyond the limitations of a traditional mobile device real estate – flexible screens, built-in projectors, 3D and holograms.

And we shouldn't expect tomorrow's drivers and trends to come from the same old places. The fastest growing markets for smart devices are Africa and Asia, where as much as 75% of all new phones are being sold. There is every reason to believe that we will see new trends – whether lifestyle or more practical, like distance learning and medicine – coming from these markets which will then globalize.

Kavita Prakash-Mani Syngenta

It's interesting to see how mobile has allowed a lot of... countries – and businesses – to skip large parts of the eco-system that we see in the West. There is very little infrastructure in things like fixed-line communications for... smallholder farmers. Africa and Asia are harnessing mobile tech but it's by no means straightforward. Language and dialect can vary hugely across region and within region. We need to look carefully at the hardware that is used, and probably the biggest question is who pays? To put a connected device in the hands of potentially hundreds of millions of people has a huge cost – and how do you test your systems on this scale? Until you have been village-to-village, you don't realise that people often share phones, and we aren't talking smart phones either.



**“Context is key
– it’s about who
you are, where you
are and what
you’re doing.”**

Identity, not connectivity

David Sear WEVE

Context is key – it’s about who you are, where you are and what you’re doing. Suppose you’re within 300 metres of a pub on a Sunday when there’s a really key football match on – that’s when we can target someone with an offer for a free beer via SMS. It’s a much more personal medium.

Helen Crowley Socialbakers

You can’t talk about social without talking about mobile: 200 million Facebook users are mobile only. The social experience on mobile is about being in the moment. Depending on where you are and what you’re doing, you can interact with the world around you and share it with your friends. Given the size of the networks’ user base, it makes absolute sense for brands to be present. Take airlines for example. KLM have more than 4 million fans on Facebook – they’re investing resource into ensuring that their community is engaged. It’s no co-incidence that they have the fastest social response time of all the airlines of just 45 minutes and respond to close to 98% of interactions. Those interactions are generally happening at airports, on the way to the airport or after an experience on the airline. Mobile is social is mobile.

It might seem strange, but the luxury brands are doing this best right now. It may seem counter intuitive as the physical store has traditionally been a big part of the luxury brand experience. But the “experience” here is key – it can be in store, on mobile while in store, in social on mobile while in store...merging brand

interactions is key, but creating a consistent experience is the challenge.

Myf Ryan Westfield

Our mobile app... allows us to feed our customers targeted content based on what they tell us they like and don’t like. When you log into the app, you’re faced with a series of brands and stores and asked if you like them – it’s as simple as swiping up or down or leaving them if you have no preference. Based on that we can then send content on a personalized basis to each user of the app. Over time we will be able to get better at bringing together offers and ideas for our customers.

Andrew Fisher Shazam

I talk about push rather than pull. Today when you use Shazam, you have to open the app and press the Shazam button to identify a piece of music or a television show or an advert. We describe that as a pull experience because the consumer is initiating it. Recently we launched a new version of our service on the iPad where if you live in North America you can put your device on the coffee table and it will detect all the music, the TV shows, and the TV ads for you. So if any of them interest you, you can go back to them. You really don’t have to do anything – it’s just basically being pushed onto your device and then you can just select through a carousel of content what you would like to engage with. A lot of the experience is now being pushed to you as a consumer and being curated on your behalf. This is where we see a transition happening, rather

than everything being curated by yourself as a consumer.

The other area I would highlight is payment; everyone has talked about payment for years in the mobile industry and we’ve obviously seen big pushes this year from people like Barclaycard and Paypal, and there will come a point where the wireless device truly does become your preferred method of payment and your virtual wallet. It is ultimately going to become your keys for your car or home, so you only have one device in your pocket instead of the three we often talk about as your wallet, keys and mobile phone. The adoption and success of true mobile payments is very much tied to people’s confidence and trust and we are still relatively immature on the adoption curve, but we strongly believe that this will change dramatically over time.

Behaviour, brands and customer interaction

“Having that continuity of engagement with the consumer is the utopia for the brand.”

David Sear WEVE

Mobile is no longer the second screen. Ask people what they pick up first thing in the morning, look at last thing at night, it's not the TV or a tablet – it's their mobile. In the 18-34 year old demographic, nearly half see it as their first and most important screen.

Kahina Van Dyke Mastercard

If you can make it really easy for people to sign up and pay, then you own the customer. And whoever owns the customer has real power when it comes to who they chose to partner with.

Michael Joseph Vodafone

Operators need to stop and think hard about what the customer actually wants and values and therefore will pay for. I think some operators have lost sight of that. The operators still own the customer and that's a key differentiator. The best operators will create value from this.

Martin Ott Facebook

We've seen a huge increase in the time people spend on Facebook, which in turn means an increase in engagement. People spend more time on mobile and are more engaged, they comment more, share more and they consume more so that has been a huge shift in the business.

For me, when you talk about TV versus mobile and second screen, mobile is already the first screen and the TV is my second screen. My phone is always with me. It's the most personal screen that I have, so it's already my first screen. You read these high percentages of people who use mobiles while in bed, in the bathroom, wherever. It's the first thing

you check in the morning and the last thing you put down at night.

It comes back to: how do we, how does a brand become relevant and interesting, now that I am actually in front of them and how do I make it about them and not about me?

Andrew Fisher Shazam

It's about making it easier to engage with traditional media like television, radio, other experiences both within the home, and outside of the home whether it's in a bar or nightclub or in a retail store.

Today for example, you can Shazam an advert on TV – let's say it's Coca-Cola. With mobile technology, it's possible to know where you are in Tesco or Sainsbury's and if you walk past a two-for-one pack offer and you've opted in, it would be possible to send a notification to your device to let you know there is an offer available from that brand. The presumption is that if you've taken the time and effort to engage with a TV ad from that brand, then if there's an offer in a retail store, you may be interested in that offer and particularly if you're stood next to it.

You can only execute on this type of use case by using mobile devices and this is how we see the world changing. For a brand like Audi, for example, no-one today has been able to connect the dots between TV advertising and traditional media right through to going into an Audi showroom. Having that continuity of engagement with the consumer is the utopia for the brand.

Kavita Prakash-Mani Syngenta

...what do you do once everyone has a phone? The obvious thing is mass

marketing. We know we can push content to them but then how do we measure the effectiveness of this and get feedback? This means you need to create reach, or find partners who have this reach. We need platforms start to get two-way communication going between the farmers and other people across the supply chain. You also have tools like M-Pesa which enable the transactions.

Finally you get to the question of scale. These solutions become commercially viable once you are at scale and that takes time and a huge amount of effort and time in the field. Because no one person or organisation knows who these farmers are, where they are and how to engage with them.

Mary Chan, General Motors

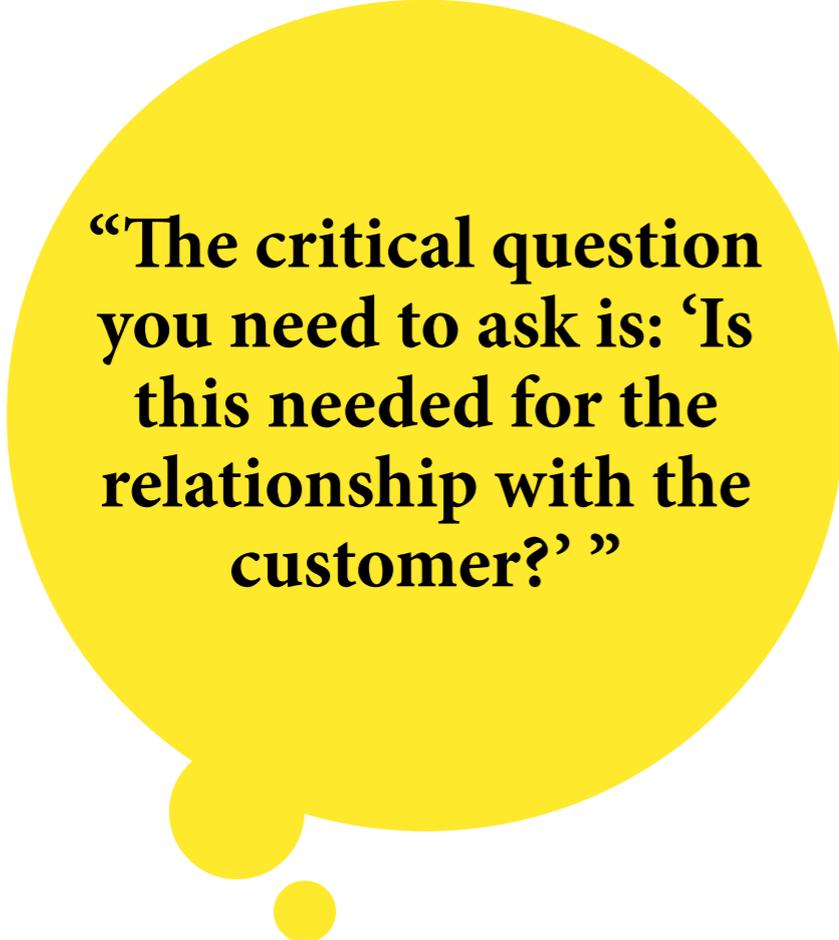
Right now, it's about user experience. We have navigation and music embedded into the vehicle. With more connectivity and cloud services, there will be a much richer user experience and your digital life will be more connected to your car. That might be through your smart phone or the car itself. We'll combine the 'app' experience with the in-vehicle experience to offer customers a more seamless, integrated service with some unique features.

Barriers broken, possibilities unlimited

Mobile is side-stepping familiar business models and creating new ones – new ways of thinking, new brands, new competition.

We don't need a bookshop to buy books. We don't need schools to learn, or banks to pay someone, or a phone number to stay in contact. We don't even need a marketing budget to create a brand.

Mobile is changing our relationships – from the bedroom to the boardroom.



“The critical question you need to ask is: ‘Is this needed for the relationship with the customer?’ ”

Changing business models

Kahina Van Dyke Mastercard

I think everyone in the payment ecosystem is aware of the changes that are happening. But if I look at the business models of the consumer banks, I think that will change radically. They are still bricks and mortar businesses with branch networks and that's how they interact with their customers. And if you look at the pressures they've been under lately from regulation, needing to strengthen their balance sheets, it doesn't leave a lot of time or money for innovation. I see some of the banks starting to partner, but it's happening slowly.

The other space that will transform is the people-to-people payments space. The customer expectation is one of instant transactions and the banking systems are not designed to deal with these low value frequent transactions

Michael Joseph Vodafone

A 1% transaction charge on small transactions is not a model that the banks are interested in. Look at typical banking products and how they're priced. What do you see? They're priced at the maximum the customer can afford, not at a price where the customer feels they're getting a great value service.

Mary Chan, General Motors

One of the big challenges I have seen is different product cycles. A car has a long life of 10 to 15 years and technology is more like 2 to 3 years, particularly cutting edge, so we need to try to build more flexibility into the

infotainment and connectivity options within each vehicle, so we build for tomorrow and today's buyers. Secondly, the development cycles for new cars is typically 3 to 4 years, but we need to refresh the technology platform much more frequently, so we need more ability to update some of the options for customers.



“Mobile and digital have been a real game changer for us.”

Shifting relationships

Myf Ryan Westfield

Mobile and digital have been a real game changer for us. If you wind the clock back five years, we had a web site and a corporate web site but we didn't have an app or a mobile optimized site. What changed that was the real uplift in online shopping which forced landlords and shopping centers to reconsider the approach to our customers. Westfield knew we needed to maintain a direct relationship with our shoppers instead of just with our retailers. This was our strategy and it's where we invested. We still lease and develop shopping centers but we also needed capability in digital marketing. The percentage of our spend on our digital channels went up versus five years ago. We don't currently measure the return on this financially as it will be felt by our retailers, which in turn is good for us.

In our London centers, I would estimate 90% of people who enter the centre have some sort of smart device – a tablet or mobile phone – and we get 70 million coming through just these two centers every year. If we aren't engaging with them, then someone else will. At best this is our retailers; at worst it's our competitors. For us, it's about how we better serve our customers and our retailers and build a direct relationship.

Helen Crowley Socialbakers

Social and mobile are finally making their way into the boardroom. Newer, forward- looking CTOs, CIOs and CMOs are really embracing this as the way of the future. Of course the generational change takes time, but there are some good examples of brands that have really embraced this new way of presenting themselves to consumers. Burberry of course is an

oft-cited example, but there are those with smaller marketing budgets that are starting to seize the opportunity. What we're seeing is that social isn't just about owned and earned activity any longer; in order for brands to cut through the noise it's likely that the social media budget will need to be applied to paid ads – not just great content that will “go viral”. Brands need to get ready for this, and some of that mobile budget will need to be spread across social for maximum reach.

Martin Ott Facebook

At Facebook, we've gone through a major change and we're now a mobile first company. It's a challenging thing to say and do. We're now focussing on mobile and this means building everything in terms of development and experience for our users first for mobile and with a mobile use case in mind. It's been an amazing shift.

We also bought in talent like Instagram who are also mobile first. We're also investing in mobile technology companies, i.e. Parse, particularly looking at the challenges emerging markets are facing where you have the old, or sometimes no smartphone penetration at all, where we're dealing with customers who have first generation phones.

Kavita Prakash-Mani Syngenta

With every project, you have the decision to buy, build or partner. Syngenta don't offer mobile products, so we have to partner for that, but when it comes to platforms and services, we can do this ourselves or look for a partner where we can share the cost and risk, and also reward. Or we can do both – by finding the right partners and building solutions

with them, or to complement their capabilities.

When I look at the attributes of a successful partnership, both sides need to invest – particularly in dedicated, responsible people. This can sometimes go as far as finding common resourcing pools between partners.

Another attribute across partnerships is to find out who are the aggregators and who are the amplifiers across the areas you're working in – bringing together the customer base and enabling two-way communication across them.



“I think a lot of industries over the next five years will be disrupted through mobile.”

Feeling the impact

William Plummer Huawei

Content providers are finally going to have to harness mobility, for instance via multi-platform, cloud-based lockers and alternative distribution models. Mobile service providers will need to better optimize their networks and leverage multi-radio environments, as well as deliver new and differentiated ‘big data’, mobile cloud and other vertical solutions, all while managing opex. Gear makers will have to work to bring down costs, for instance via network-data center integration, while extending access, e.g. via small cell and multi-network access.

Software folk will continue to capitalize on mobile enablement, mobile cloud, security and other vertical solutions and the internet services guys will continue to focus on powering the cloud and acting as value-chain integrators across mobile and fixed access – which of course creates differentiation challenges for everyone mentioned so far. As for the devices companies, they’re going to have to innovate experiences transcending handsets, including everything from cloud extensions to connected homes and vehicles.

Martin Ott Facebook

I think a lot of industries over the next five years will be disrupted through mobile. Take healthcare for example – this is a huge industry that has just started to see what mobile connectivity can mean, but more education is needed.

In terms of the producing industries, productivity through machine-to-

machine communication is a new field and it spans over all industries. But, it’s not only about healthcare and education, it’s about safety; it goes all the way to improving our standards of living across the world.

David Sear WEVE

I think that some of the more established media channels, such as TV, will change and some of the traditional marketing disciplines, such as direct mail, will need to evolve. We’re already seeing a change in viewing habits to be on-demand and on our schedule and preferences – not on someone else’s. There are still huge marketing budgets that will have to be spent, but in the future a marketer that doesn’t think about mobile, isn’t going to be able to engage their customer. Longer term, that will impact the status quo in the marketing and advertising industries.

I also think that banking and payments will fundamentally change. Before the crash, when you spoke to bankers, they would tell you they don’t make money out of banking. The banks missed the opportunity that PayPal saw because they didn’t see enough money in payments. The banks aren’t in the ‘pay day’ loans because they don’t believe they can make money out of higher risk profile customers. But Wonga seems to be managing this. Perhaps there is a leadership problem in that the financial services leaders can’t see the wood for the trees on these opportunities.

The other challenge the banks face is with the regulation that’s surrounding them. The appetite and capital are

both at a low. When you couple that with the struggle to recruit the right kind of talent, it means innovation won’t come from the banks.

One of our mantras here is “solve problems that exist”. I think that’s something that the banks could learn from.

Andrew Fisher Shazam

In the advertising and media industry right now there is a significant increase in time spent on mobile devices by consumers, which is leading to a change in their habits and behaviours.

In the context of TV specifically, Nielson and Yahoo reported last year that 80% of consumers in North America have a mobile device open whilst they’re watching television. Given television advertising is a US\$300bn industry worldwide, that’s incredibly significant that 80% of viewers actually have a capability to interact with either the television show itself or the advertisements whilst they’re watching TV.

Beware the amplified customer

As consumers, we can now access the data we want about people, products and services, wherever and whenever we need it.

We're in control of what we know and say about organisations. We have the power to cut them out of our lives, to by-pass advertising and seek information from our sources of choice.

And we have the tools to amplify our voices in a more powerful way than ever before.



“the consumer is now totally in control”

Customer power

Ije Nwokorie Wolff Olins

When I talk to my clients, the conversation is no longer about how they can push out messages or a brand campaign. Brand used to be about control; it used to be you pushing to your customer the messages you wanted them to hear. Mobile is the final nail in that coffin. Nowadays, wherever I am, I can find out information about a company or share my views. I can find out how good a coffee shop is right before I go in there (or not!). And the reason mobile is the final nail is that today, the least reliable source of a brand is the company itself. Because, of course, the company will tell you they are great, or their cars are reliable, or their drink makes you run faster. But I may trust a complete stranger more because they're independent; they have no vested interest in telling you where to go or what to do.

And people enjoy getting around the system, sidestepping big institutions and building their own solutions. They combine social networks, mobile access and local knowledge to come up with a way of solving their problem.

So, it's true, the customer is in control. Today a single customer can have as big an impact on your brand as your entire marketing spend.

More and more I talk to clients and ask them the question: "What are you helping your customer to do?" With mobile, you can be part of solving a customer's problem, anything from booking a taxi easily or finding seats for the best shows in town. Mobile has meant you can be part of your customer's life – if you're able to help them.

Martin Ott Facebook

It comes down to the fact, that the consumer has the choice: "Do I want to see this now?" I don't have to sit in front of a TV anymore until the next commercial break and consume what is being told to me, I can just switch to another channel or look on the web or on the mobile, so it becomes about creating a much more relevant brand experience.



**“anyone can
change the world
now because of
the power mobile
brings”**

Finding a voice

David Sear WEVE

Outside of the developed world, mobile is a real leveler and is democratizing the world – it’s giving everyone a camera and a voice and anyone can be a leader – anyone can change the world now because of the power mobile brings. I think it’s made the world a more ubiquitous and transparent place.

The exciting thing is we’re just at the beginning – it’s like we’re at internet 1.0 right now when you had static web pages – and look at where we are now. Imaging that change for mobile.

Iris Lapinski CDI Apps For Good

You have immense power through mobile. People have access to information in places they never had before. If you think about what we do, if a child is being bullied or is having problems, they can seek help through their mobile. They can do that anywhere from the school toilet, to their playground, to their own bedroom.

Ije Nworie Wolff Olins

The rule is that if you don’t want your customers to know what you’re doing, then you shouldn’t be doing it. Because over time it will come out, and with social media and the current climate of transparency, people will know about it and you’ll lose your customers’ trust. We’ve seen Facebook fall foul of this a couple of times and it’s hurt them.

Data, data everywhere

The race is on between consumers and organisations to understand and use data to their advantage. There will be huge rewards for the winners and big penalties for the losers.

More data brings more risk. How organisations use that data will help to differentiate them, even define them. Trust in data and organisations will become more critical than ever. And breaches in trust can destroy relationships.

As individuals appreciate the power and value their personal data gives them, they want more in return for giving it away.

“companies now potentially know where you are and what you actually interacted with or viewed”

Big data exchange

Andrew Fisher Shazam

You have the whole category of big data now evolving and companies becoming far more sophisticated and insightful about their target consumers. Add location and presence into that mix and companies now potentially know where you are and what you actually interacted with or viewed. That is very rich data for people to start profiling and building personalised services around it, so I think as a consumer what you'll see is more contextually relevant offers being made to you.

David Sear WEVE

Advertising is the first industry that has to evolve as mobile becomes more dominant and the approach for this is changing rapidly. We're just starting to see the ability to genuinely target consumers based on sophisticated data. You only have to look at the growth of Facebook's mobile advertising revenue to realize that. When I speak to marketing directors, the message I am getting is: "We just can't pour enough money into Facebook advertising now" because it's the one platform that allows you to target specific demographics and measure the return.

Privacy v personalisation

Ije Nwokorie Wolff Olins

Partly due to advances in technology, customers' expectations of the nature of the relationships they have with organisations has shifted. There's a new type of mainstream now – some call it the 'post-consumer' world. It's very much about a more balanced, two-way dialogue and exchange between people and organisations

However, I don't believe that when people sign up for Twitter, Facebook, Foursquare, Pinterest, Instagram, whatever, they have any real idea of what data they give away and how it's used. These organisations have a lot of our data and trust and need to be careful with that. So both customers and businesses have to think more in terms of what value can they create for each other, i.e. companies should consider what would a fair exchange for personal data be and how can they give something – whether service, personalisation, utility – in return, that makes life better.

Iris Lapinski CDI Apps For Good

People know that there's a lot of data available about them – where they are, what they like, who they're friends with. I also think it's a myth that young people have a different attitude to privacy. When people know what they're giving away, young or old, it makes them think. I think in the future people will realize that their data is an asset. And the thing about assets is that you don't give them away easily, or with no return. Businesses will realize this soon and we may see people being rewarded more than they are today for their personal data.

Andrew Fisher Shazam

I think when you look at value creation in the industry, companies like Facebook and Twitter, who capture people's profiles and data, create a huge barrier to exit from their services. Whilst companies will become more sophisticated in this regard my feeling is there's going to be more consumer resentment and awareness of this.

All companies in my opinion should be highly sensitive to data and privacy settings in any mobile service. It's really important to ensure that people understand the value of why they would be sharing or allowing a service provider to utilise their information. You've seen the fall-out with Facebook and others in terms of how fast they've had to react when one thing goes awry in their businesses and how quickly that can get propagated across the whole internet. That's the world we live in. So, being proactive, but also being reactive to people's sensitivity around data is going to be a critical business process.

Kahina Van Dyke Mastercard

For me, privacy has three elements: firstly, it's generational; second, customers are understanding privacy more and more; and finally, regionally it varies hugely.

Generations who have grown up online understand what they're giving away and understand it's a deal. By giving away some of your data, you get a personalized experience. By making everything private, your experience suffers and so this generation will share to a degree.

The customer is getting much smarter at deciding who they exchange information with and what they expect in return, and slowly organizations are catching up with this.

Finally, privacy in China and privacy in the US mean very different things. The expectations are completely different and they can be deeply embedded in cultures. I don't believe we will ever see a balancing of privacy preferences or principles across the world as it's so culturally different.

Martin Ott Facebook

With any new technology, consumers are learning to use technology and there is a big responsibility for the industry, which is us, to take the consumer along the learning journey and make them aware of how to use it.

I wouldn't even call it a trade-off because privacy is something very personal and I think everybody needs to be able to freely decide for themselves what they want to share and with whom they want to share it.

At the same time we talk about personalization; consumers want a more personalised experience. In the past, advertising was about push and branding. A company told you: "We're the best, we're the greatest, buy our stuff" and they created a great image of their brand. And the creative industry was about creating an image, creating aspirations and creating a brand. There was promise of something.

What the internet has taught us is that there is much more transparency; you cannot just create an image of something that you don't deliver, so you have to be much more authentic.

Myf Ryan Westfield

One thing we are very careful of is people's privacy. We don't ask them where they live or if they have children because we think that crosses a line. We want to know how they like to shop and eat and enjoy themselves when in one of our centres. It can share things like upcoming events, store openings, special offers which are related to the stores you like.

“The customer is getting much smarter at deciding who they exchange information with and what they expect in return”



**“a more
transparent
regulatory and
legal environment
is a must”**

Rules of the game

Iris Lapinski CDI Apps For Good

I believe we will see more regulation coming, but regulation is usually delivered as a result of crisis rather than carefully planned and executed governments. The flow is normally: under-regulation where consumers are taken advantage of, through to over regulation and then a healthy degree of regulation. For example, I think we should see some sort of control for under-18 year olds. We all do stupid things growing up and the internet has an eternal memory. Once something is on there, it can be very difficult to get off. You don't want your boss knowing something stupid you did 15 or even 20 years ago when you start work.

Martin Ott Facebook

This is at the very heart of what we do, addressing the privacy concerns of people and making sure that they are aware and that they are empowered to go online to share and interact with whom they like.

That is key for us as an industry, working together with the regulatory bodies. To enable this, we need common standards, otherwise if you have different standards in different countries and different regulators, that makes it very, very difficult to find a scalable and a good approach for consumers to share beyond borders.

William Plummer Huawei

There is definitely a crisis of confidence in the global information and communications technology industry, in part driven by the

Snowden revelations coming out of the US. A concerted public-private and global initiative is required to restore faith, focused in three realms. In terms of gear makers, we need to develop certifiable standards and best practices – from ideation to end of life – to ensure that the gear sold into networks is secure. And these standards must be applied universally – to all vendors.

With respect to service providers and data managers, a more transparent regulatory and legal environment is a must. In this respect, I think it's almost time for a sequel to The Cluetrain Manifesto. I'm not sure what we would call it, but this time, instead of targeting corporate online behaviour, it should be aimed at governments around the world demanding more freedom and protection.

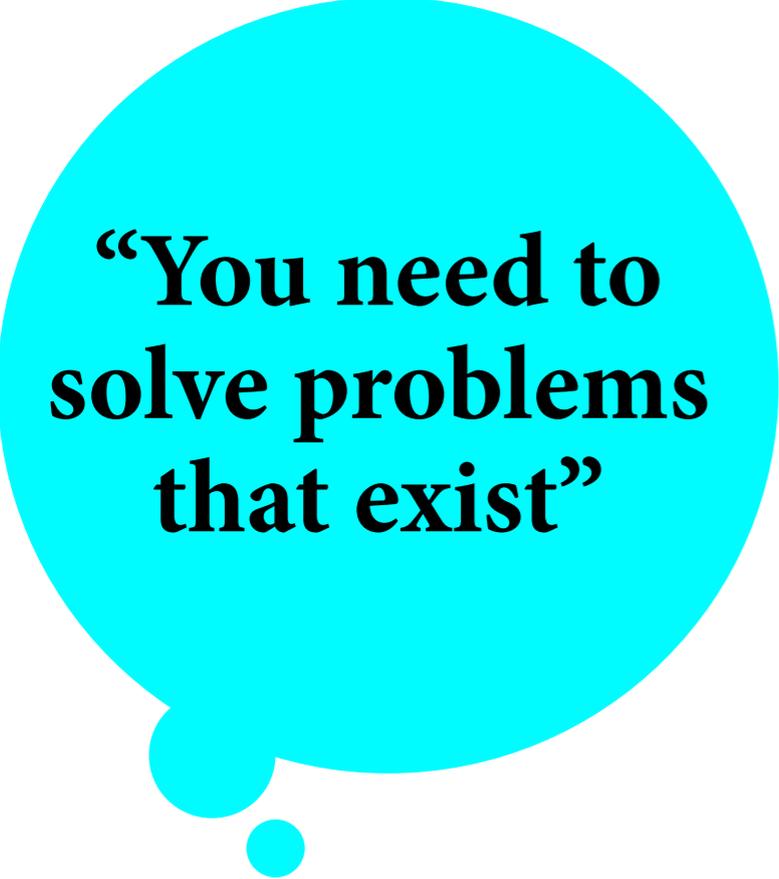
Lastly, in terms of governments themselves, they need to come to some sort of agreement – cyber détente – which defines acceptable behaviour between and among themselves.

Future game changers

Who's next? Where will the next generation of CEOs driving and harnessing the mobile revolution come from? What are the implications for organisations in their search for talent?

Mobile is challenging established business structures, reshaping roles, redefining career success. Securing, motivating and retaining the talent to seize the opportunities is a big ask.

So, who will be the MobileGameChangers of tomorrow? We'll leave our final thoughts to the experts of today...



“You need to solve problems that exist”

Ije Nwokorie Wolff Olins

The most forward-looking businesses are now taking down the silos. You see organisations where the ‘Head of Online’ and the ‘Head of Digital’ have different goals – even conflicting goals, and that just can’t happen. You will confuse or lose your customers. It’s finally dawning on organisations that alignment will help their customers engage more.

Some CMOs have seized the opportunity and used their knowledge and capabilities to understand the channel and use it. Mobile can help CMOs be really imaginative in connecting with customers in individual, meaningful ways that are useful. Others have just put their heads in the sand because they can’t grasp its power or complexity. The best CMOs I have seen make their role a change agent for the business. They understand how technology can grow their business and how they can make products that fit those channels. They have that understanding of where technology meets the customer and how it will be part of their day-to-day lives.

David Sear WEVE

I see two things that successful people do. Firstly they can deal with a high degree of complexity. Beyond this, they can make what is complex seem simple. That’s a real power. The second thing is a commercial awareness. Having innovative ideas is great – but you need to solve problems that exist. And if you can solve problems that exist, you need to do that in a commercial way.

Kahina Van Dyke Mastercard

The global business transformation has been enabled by technology, but it will ultimately be designed and executed by talented individuals working together. The successful organisation of the future will need to facilitate environments that harness collective intelligence from a diversity of experiences. At first, it may feel slightly uncomfortable for

companies to hire leadership from non-traditional backgrounds. However, this era of collaboration will create new business opportunities, new interaction models and a unifying concept of global citizenship. It will be a time of exciting change.

Michael Joseph Vodafone

We needed a culture of innovation to make this happen. In large corporates this can be a challenge as there are approvals, there are processes and I have no doubt that M-Pesa could easily have been stopped had we not had the right culture to make it happen. And you need resilience too.

Myf Ryan Westfield

Westfield Labs was originally due to be set up in Australia where our global headquarters is. But it’s now in San Francisco because that’s where you’ll find Google and Facebook – which is a step change for Westfield. The second important thing is that the head of Westfield Labs reports into Steven Lowy, our Co-CEO, which is a statement as to how important digital is for us.

William Plummer Huawei

We have over 70,000 people doing R&D for Huawei with an average age of 28. And it’s global talent; we have R&D centres across the globe, including the US. That talent needs to be diverse, culturally and geographically. That brings challenges. Indeed, I’ve seen people with great track records fail because they weren’t able to adapt to another culture. The attributes I see which make people successful are a global mindset, being nimble in all aspects of how they work and managing contrary, and sometimes conflicting cultures.

Kavita Prakash-Mani Syngenta

Firstly, people need to understand reality. Particularly in my world, you might arrive with a PhD or have studied and written reports

and have a clear point of view about what needs to be done. That’s useful, but unless you have met and spoken to smallholder farmers, all of the above is useful theory but hopeless when it comes to execution.

Secondly, both the person and the organisation must be willing to try. What I mean by this is really get their hands dirty and work bottom-up across organisations to build real solutions. Arriving to the market at scale is virtually impossible, so this is one of the ways that you make change genuinely happen.

With trying comes failure. Both the individual and the organisation must be accepting of failure, and learn from it and move on. It helps you innovate towards a solution. Just so long as you fail fast, learn fast and move on, it’s a positive thing.

Finally, people need to speak the language of the stakeholders. These roles are often translation roles between various parts of the value chain and to be able to articulate to the right audiences in words and structures they understand is crucial.

Mary Chan, General Motors

I love to be part of a transformation – to be where people enjoy being challenged. The market and ecosystem around the connected vehicle is moving rapidly and we have the chance to be an integral part of that – even help define it.

In search of talent

Our MobileGameChangers conversations give us some strong clues about the talent of the future. They'll probably be 'rule breakers' – people who are 'comfortable with chaos'. They'll be able to inspire others to take calculated risks and deliver results. They'll own outcomes rather than resources. And they'll be able to empathise across cultures – defying industry norms to create lasting legacies.

RUSSELL REYNOLDS ASSOCIATES

Leadership, Succession and Search



For further insight into the attributes of the MobileGameChangers of tomorrow, contact **Russell Reynolds**