

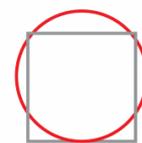


Industries > Software

## The Mobile Enterprise: Implications on the Value Chain

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We explore how the mobile enterprise value chain has changed as technology continues to evolve.



**RED CHALK**  
GROUP

# The Mobile Enterprise: Implications on the Value Chain

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**ABSTRACT: The penetration of wireless and mobile devices in addition to workflow convergence with mobility has unlocked the concept of “The Mobile Enterprise.” We analyze the value chain that has formed to serve the mobile enterprise.**

Frequently, mobile device proliferation is associated with media, entertainment, and personal consumption – however, mobility represents a paradigm shift for the modern enterprise, enabling incremental capabilities, advanced productivity methods and efficiency gains, altered organizational dynamics, and new digital channels to market. More specifically, the penetration and convergence of mobile form factors (e.g., smartphones), enterprise IT applications, and cloud infrastructure have collectively catalyzed a move towards holistic enterprise mobility.

The mobile enterprise value chain has evolved in the past decade and now includes a variegated set of segment focused players – notably, the recurrence of leading IT players such as Cisco, IBM, and SAP. See Exhibit 1.

## Exhibit 1: The Mobile Enterprise Value Chain

### MOBILE ENTERPRISE USE CASES

Mobile Use Case	Communication and Collaboration	Productivity	General Administrative	M2M	Customer Channels
					
Overview	<ul style="list-style-type: none"> <li>The modern enterprise involves remote access and virtual teams – mobile enterprise capabilities facilitate communications and collaboration of employees via video, voice, and messaging applications.</li> </ul>	<ul style="list-style-type: none"> <li>Mobile tools aimed at enhancing productivity for the employee – this includes remote access to content and applications such as CRM software, ERP tools, and KPI trackers / dashboards aimed at replicating the “in the office” experience when remote</li> </ul>	<ul style="list-style-type: none"> <li>Those activities in supplement, as opposed to at core, to key functions can be handled in an efficient, mobile manner – for example, reporting of project hours, expenses, or activity logs</li> </ul>	<ul style="list-style-type: none"> <li>Productivity of enterprises can improve as sensors are deployed across supply chains, inventories, and operational assets to enable intelligent networks and proliferation of “Big Data” to support deeper insights from analytics</li> </ul>	<ul style="list-style-type: none"> <li>The penetration of mobile unlocks new channels of engagement with consumers by increasing the touchpoints with consumers (e.g. infotainment tags engaging with consumers in an automobile)</li> </ul>
Strategic Implication	<ul style="list-style-type: none"> <li>Vendors with high QoS and compelling, integrated cloud-based collaboration tools will be best positioned</li> <li>Unified suites of mobile services will be compelling</li> <li>Secured connectivity by a trusted partner will be critical</li> </ul>	<ul style="list-style-type: none"> <li>Participants offering a seamless experience from remote to in-office modalities will be favored</li> <li>Custom offerings / bundles based on enterprise sizes (e.g. small, medium, large, Global 2000)</li> <li>Holistic cloud platforms / solutions necessary</li> </ul>	<ul style="list-style-type: none"> <li>Ease of use, simple user interfaces, and clear functions for the administrative applications will be positive differentiators</li> <li>Low cost applications will be compelling</li> </ul>	<ul style="list-style-type: none"> <li>Vendors that can integrate Big Data analytics, sensory hardware, and software to untap productivity in intelligent networks</li> <li>Market would favor end-to-end solutions</li> <li>Managed services play possible / systems integration</li> </ul>	<ul style="list-style-type: none"> <li>Robust OTT and Content Delivery capabilities will be competitive assets</li> <li>Business models that attract partners across the value / delivery chain will be necessary</li> <li>Tailored offerings based on enterprise functions / verticals</li> </ul>



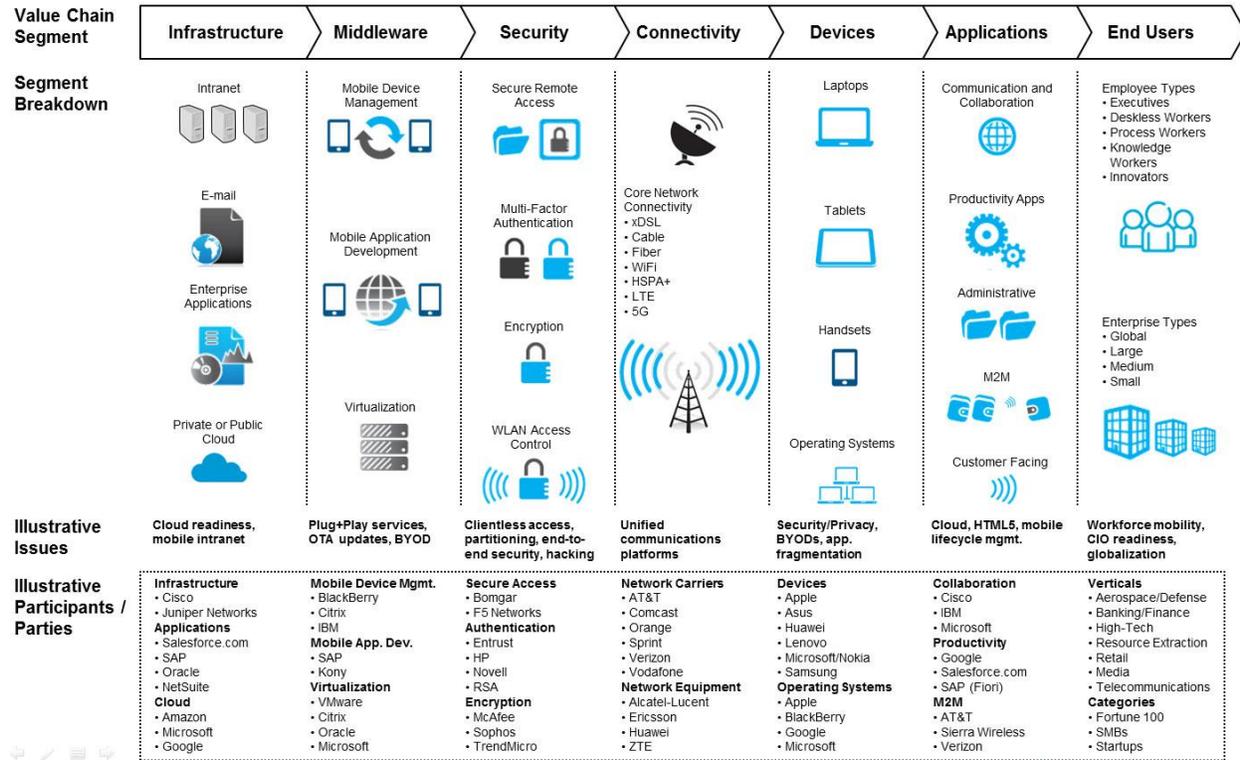
The evolution of the value chain has enabled as set of discrete use cases, each with associated strategic implications for ecosystem participants: collaboration, productivity, administrative, M2M, and customer access:

- Communication and Collaboration
- Productivity
- General Administrative
- M2M
- Customer Channels

We highlight strategic implications for key market participants across the value chain as catalyzed by the continued evolution and uptake of each use case. See Exhibit 2.

## Exhibit 2: Mobile Enterprise Use Cases

### THE MOBILE ENTERPRISE VALUE CHAIN



Looking forward, the emergence of compelling, cloud-based collaboration platforms, QoS differentiation, incremental digital channels to engage customers/ stakeholders, and the evolution of tailored Big Data analytics collectively imply vertical integration moves, likely through M&A, in addition to new alliances / partnerships and JV models. These strategic moves are expected as vendors develop to better serve an end-user segment that is fragmented across dimensions critical to unique enterprise clusters, including but not limited to: security, customer engagement, B2B/B2C models, and operational breadth.

## Contact

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