

2015 North American Mobile Enterprise Productivity
Visionary Innovation Leadership Award



FROST & SULLIVAN



50 Years of Growth, Innovation & Leadership

Contents

Significance of Visionary Innovation Leadership6

Understanding Visionary Innovation Leadership6

Key Benchmarking Criteria7

The Intersection between 360-Degree Research and Best Practices Awards.....7

Research Methodology.....7

Best Practices Recognition: 10 Steps to Researching, Identifying, and Recognizing Best Practices8

About Frost & Sullivan9

Background and Company Performance

Industry Challenges

As organizations increasingly foster mobile workforces, time and location-based hurdles that previously slowed data access and transmission—thereby slowing business—are being cleared. Many fixed solutions have emerged that enable employee access to company email and documents from a mobile device, and the Bring Your Own Device (BYOD) phenomenon gained incredible momentum due to a cross-industry need to keep up with the increasing pace of global business. Although more can get done with mobility, BYOD methods of business are not fail-proof, and this means a quandary for forward-facing businesses. For example, employees may find it increasingly difficult to compartmentalize tasks, making the work and home life balance tricky. These blurred lines between work and home potentially lead to inconsistent performance and an increased likelihood of mistakes or security breaches. Furthermore, the costs associated with employing an agglomeration of disparate solutions can be substantial.

Frost & Sullivan analysts have determined that the optimal solution to this multi-layered dilemma is a comprehensive and affordable mobile platform that will streamline tasks, establish clear enterprise access and control over data, and empower workers with tools that improve their organization and productivity. Google's Android for Work is not only poised to answer such modern dilemmas on a far-reaching scale, it will do so by providing a streamlined mobile solution for both organizations and employees alike.

Focus on the Future and Best Practices Implementation of Google

Founded in 1998 and headquartered in Mountain View, California, Google went public in 2004. A company that began as a search engine founded by Larry Page and Sergey Brin, Google has grown into an innovative powerhouse providing web-based services and products. Google's Android is an operating system (OS) for mobile devices that also employs a host of dedicated interfaces, for such uses as wearables, televisions, and automotive.

Focus on Unmet Needs and Growth Pipeline

Many existing mobile enterprise productivity solutions only take into account a single use case, such as a mobile organizer or the need businesses have for employees to be always "on" and reachable across time zones and when traveling. Many applications were not developed with the expertise required to provide enterprise-level solutions. Google's broad technological reach is proof of its tireless dedication to anticipate the needs of tomorrow's mobile customer.

Openness, agility, choice, and flexibility are the mainstays of Google's "for Work" solution set. Google for Work solutions are comprised of: *Android for Work*, *Chrome for Work*,

Google Apps for Work, Google Cloud Platform, Maps for Work, and Search for Work. Solutions such as these are designed to provide access to company data securely, and research suggests there is a strong need and ample market opportunity for expansion to high-potential users including areas related to field service organizations, home healthcare agencies, distribution and courier services, and the public sector (Frost & Sullivan’s “Analysis of the North American Mobile Workforce Management Market”).

Vision Alignment and Process Design

In order to compete in today’s market, solution providers must be process driven, and focus on creating an effective strategy that will carry over smoothly as technology progresses. *Android for Work* offers, in conjunction with its partnering solutions, an optimized method for consistently managing an array of Android devices using a single management console. Android will work to provide user-friendly ways to find, set up, and provision global management of applications across mobile devices.

Google’s transparency and technology prowess have led to brand equity that is so pervasive that Google is often used as a verb. Google has grown beyond its roots in search and now offers a wide variety of products and services for consumers and business customers. With technology expertise and extensive reach, it is well-positioned to roll out work-friendly mobile solutions on a massive scale.

Technological Sophistication and Company Culture

Google has leveraged its research, development, and experience serving mobile customers to position *Android for Work* as a valuable, scalable tool for a variety of industries. New application programming interfaces allow *Android for Work* to be used for innovative uses, such as advanced medical solutions, field logistics and delivery, consumer kiosks, and revolutionary workflow management capabilities in industries that have yet to really embrace mobile business practices.

Moreover, it allows enterprise use without worry over security breaches that could happen on a personal device. Specifically, customized enterprise controls determine what information any given employee device can reach at any given time. By providing such meticulous control over mobile-accessible workplace data and documents, and by focusing on a broad spectrum of customers, rather than only on those currently implementing similar but less-comprehensive solutions, Google is positioning itself to be a mainstay of a future mobile-driven marketplace in which such comprehensive mobile work solutions are imperative. In this way, Frost & Sullivan research suggests, Google will lead the charge toward transformational mobile practices across industries only beginning to mobilize work solutions.

Conclusion

With unwavering dedication to its customers and a clear line of sight into the enterprise-specific challenges that come with increased use of technology, Google is in a unique position to address the needs of tomorrow's professionals. The company's adaptable and future-proof solution, *Android for Work*, equates to durable leadership. Google has rightfully earned Frost & Sullivan's 2015 North America Visionary Innovation Award for Mobile Enterprise Productivity.

Significance of Visionary Innovation Leadership

A visionary innovation leadership position enables a market participant to deliver highly competitive products and solutions that transform the way individuals and businesses perform their daily activities. Such products and solutions set new, long-lasting trends in how technologies are deployed and consumed by businesses and end users. Most important, they deliver unique and differentiated benefits that can greatly improve business performance as well as individuals' work and personal lives. These improvements are measured by customer demand, brand strength, and competitive positioning.



Understanding Visionary Innovation Leadership

Visionary Innovation is the ability to innovate today in the light of perceived changes and opportunities that will arise from Mega Trends in the future. It is the ability to scout and detect unmet (and as yet undefined) needs and proactively address them with disruptive solutions that cater to new and unique customers, lifestyles, technologies, and markets. At the heart of visionary innovation is a deep understanding of the implications and global ramifications of Mega Trends, leading to correct identification and ultimate capture of niche and white-space market opportunities in the future.

Key Benchmarking Criteria

For the Visionary Innovation Leadership Award, Frost & Sullivan analysts independently evaluated two key factors—Focus on the Future and Best Practices Implementation—according to the criteria identified below.

Focus on the Future

- Criterion 1: Focus on Unmet Needs
- Criterion 2: Visionary Scenarios through Mega Trends
- Criterion 3: Growth Pipeline
- Criterion 4: Blue Ocean Strategy
- Criterion 5: Growth Performance

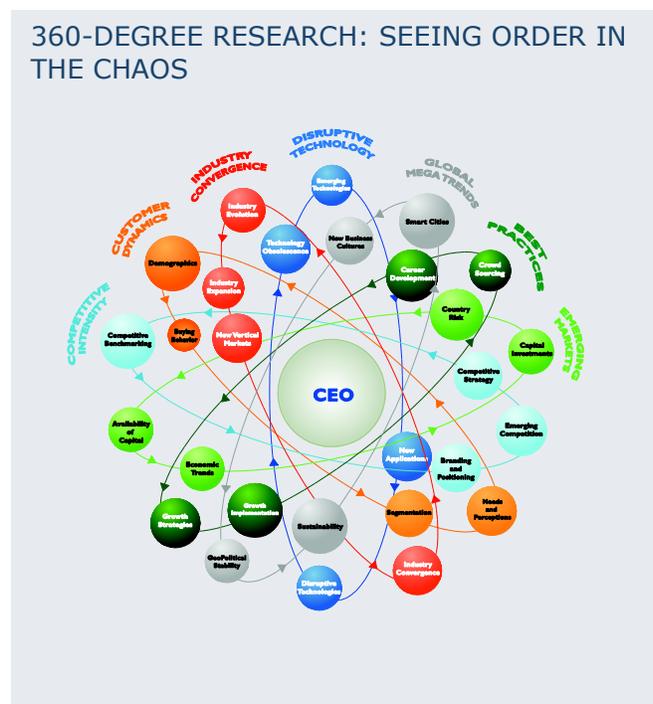
Best Practices Implementation

- Criterion 1: Vision Alignment
- Criterion 2: Process Design
- Criterion 3: Operational Efficiency
- Criterion 4: Technological Sophistication
- Criterion 5: Company Culture

The Intersection between 360-Degree Research and Best Practices Awards

Research Methodology

Frost & Sullivan’s 360-degree research methodology represents the analytical rigor of our research process. It offers a 360-degree-view of industry challenges, trends, and issues by integrating all 7 of Frost & Sullivan's research methodologies. Too often, companies make important growth decisions based on a narrow understanding of their environment, leading to errors of both omission and commission. Successful growth strategies are founded on a thorough understanding of market, technical, economic, financial, customer, best practices, and demographic analyses. The integration of these research disciplines into the 360-degree research methodology provides an evaluation platform for benchmarking industry players and for identifying those performing at best-in-class levels.



Best Practices Recognition: 10 Steps to Researching, Identifying, and Recognizing Best Practices

Frost & Sullivan awards follow a 10-step process to evaluate award candidates and assess their fit with select best practice criteria. The reputation and integrity of the Awards are based on close adherence to this process.

STEP	OBJECTIVE	KEY ACTIVITIES	OUTPUT
1 Monitor, target, and screen	Identify award recipient candidates from around the globe	<ul style="list-style-type: none"> • Conduct in-depth industry research • Identify emerging sectors • Scan multiple geographies 	Pipeline of candidates who potentially meet all best-practice criteria
2 Perform 360-degree research	Perform comprehensive, 360-degree research on all candidates in the pipeline	<ul style="list-style-type: none"> • Interview thought leaders and industry practitioners • Assess candidates' fit with best-practice criteria • Rank all candidates 	Matrix positioning all candidates' performance relative to one another
3 Invite thought leadership in best practices	Perform in-depth examination of all candidates	<ul style="list-style-type: none"> • Confirm best-practice criteria • Examine eligibility of all candidates • Identify any information gaps 	Detailed profiles of all ranked candidates
4 Initiate research director review	Conduct an unbiased evaluation of all candidate profiles	<ul style="list-style-type: none"> • Brainstorm ranking options • Invite multiple perspectives on candidates' performance • Update candidate profiles 	Final prioritization of all eligible candidates and companion best-practice positioning paper
5 Assemble panel of industry experts	Present findings to an expert panel of industry thought leaders	<ul style="list-style-type: none"> • Share findings • Strengthen cases for candidate eligibility • Prioritize candidates 	Refined list of prioritized award candidates
6 Conduct global industry review	Build consensus on award candidates' eligibility	<ul style="list-style-type: none"> • Hold global team meeting to review all candidates • Pressure-test fit with criteria • Confirm inclusion of all eligible candidates 	Final list of eligible award candidates, representing success stories worldwide
7 Perform quality check	Develop official award consideration materials	<ul style="list-style-type: none"> • Perform final performance benchmarking activities • Write nominations • Perform quality review 	High-quality, accurate, and creative presentation of nominees' successes
8 Reconnect with panel of industry experts	Finalize the selection of the best-practice award recipient	<ul style="list-style-type: none"> • Review analysis with panel • Build consensus • Select winner 	Decision on which company performs best against all best-practice criteria
9 Communicate recognition	Inform award recipient of award recognition	<ul style="list-style-type: none"> • Present award to the CEO • Inspire the organization for continued success • Celebrate the recipient's performance 	Announcement of award and plan for how recipient can use the award to enhance the brand
10 Take strategic action	Upon licensing, company may share award news with stakeholders and customers	<ul style="list-style-type: none"> • Coordinate media outreach • Design a marketing plan • Assess award's role in future strategic planning 	Widespread awareness of recipient's award status among investors, media personnel, and employees

About Frost & Sullivan

Frost & Sullivan, the Growth Partnership Company, enables clients to accelerate growth and achieve best in class positions in growth, innovation and leadership. The company's Growth Partnership Service provides the CEO and the CEO's Growth Team with disciplined research and best practice models to drive the generation, evaluation and implementation of powerful growth strategies. Frost & Sullivan leverages almost 50 years of experience in partnering with Global 1000 companies, emerging businesses and the investment community from 31 offices on six continents. To join our Growth Partnership, please visit <http://www.frost.com>.