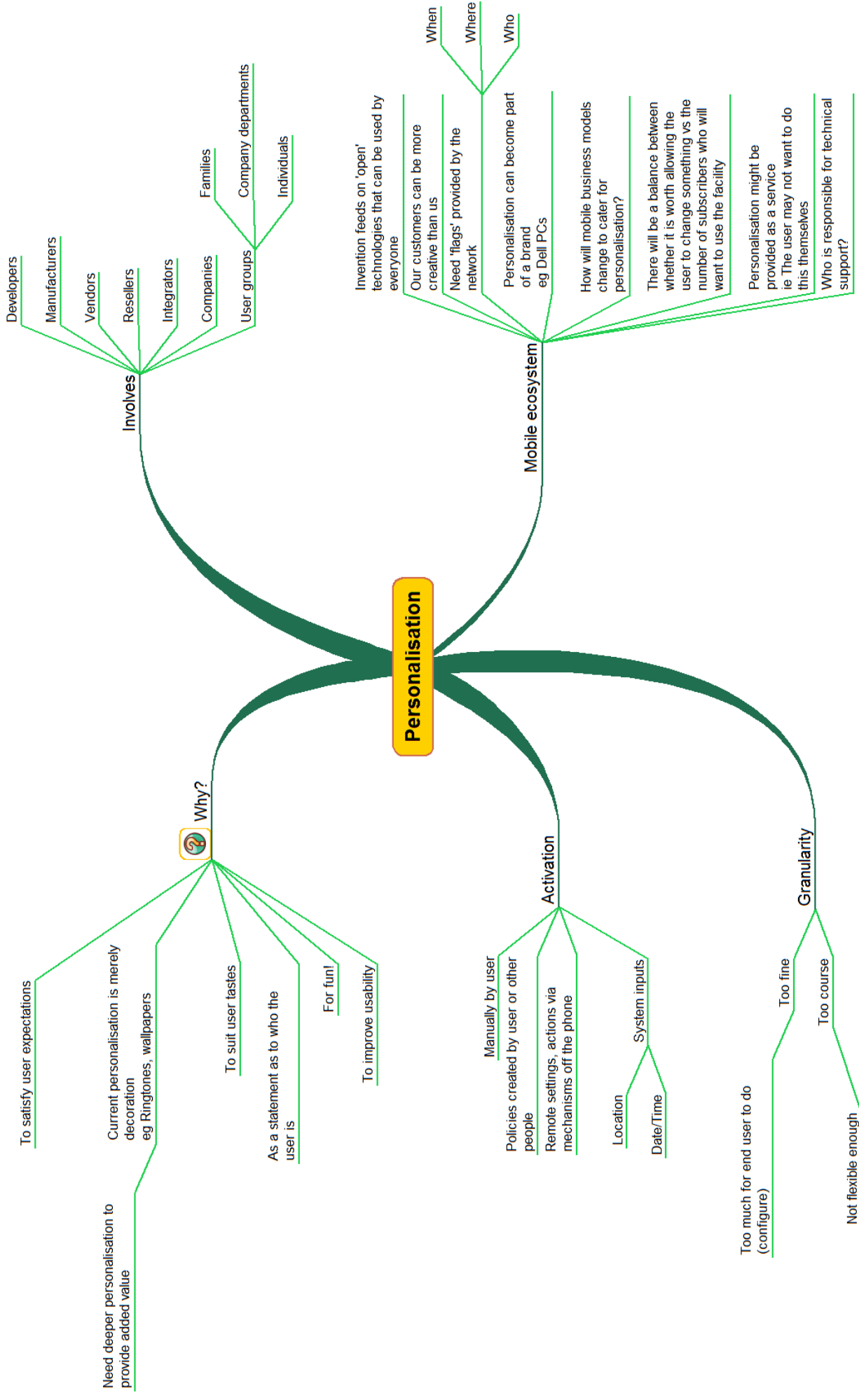


**MEX Map: Building personalisation into every level of value chain to grow margins and deliver an individualised experience**



# Building personalisation into every level of value chain to grow margins and deliver an individualised experience

## Keynote speaker

Mark Rolston, Senior Vice President, Creative, Frog Design

## Expert panellists

- Nick Allott, CTO, OMTF
- Carlos Oliveira, CEO, MobiComp
- Herbert Vanhove, Vice President & General Manager, Qualcomm

## Manifesto statement

The objective is to provide the best mobile experience for each individual. Developing chipsets, software platforms, handsets and services which make it cost-effective to provide this level of personalisation will delight users and drive profits for the industry. We think the industry can grow its margins if it finds a way to build personalisation into every level of the value chain.

## Speaker's response and panel summary

We all have high expectations of mobile and the best way to address these expectations is through personalisation.

Personalisation is a child of customisation, an activity carried out at provisioning time for markets, brands and customers. Integrators, user groups and families are currently excluded from this part of the value chain.

Personalisation has a social element, whether examined on an individual or a global scale. Decisions made during the process indicate taste, say who the user is and provide trivial entertainment.

Why are handsets all the same when open systems (on which the PC industry is based) allow for innovation.

## **Building personalisation into every level of value chain to grow margins and deliver an individualised experience**

Mark drew together a number of concepts: folksonomies, crowdsourcing, Bruce Sterling's 'spimes', back-street handset repair shops in Bangalore and Web 2.0 mashups to demonstrate an ecosystem where customers expect value to be 'moved around'.

At the centre of this would be 'policy-based computing', where software reacts to external influences: location, time and other contextual elements.

Operators seem to be afraid of personalisation, or at least keen to not allow it. Perhaps this is driven by a desire to protect brands or perhaps because the technology will have a cost regardless of whether or not it is popular with consumers.

There was some doubt over whether consumers were ready for mass personalisation, or handsets able to support it. Mark hoped to see a carrier launch which would focus on being the best network and let end-users handle personalisation their handsets.

He asked why so many companies in the mobile industry wanted to be 'We are we' brands (e.g. Vodafone's 'red everywhere' handsets) when other businesses were enthusiastically embracing the 'We are you' model (e.g. Dell, with its individually built PCs) by allowing people to personalise their own experiences and 'co-create' products.

## Additional research notes

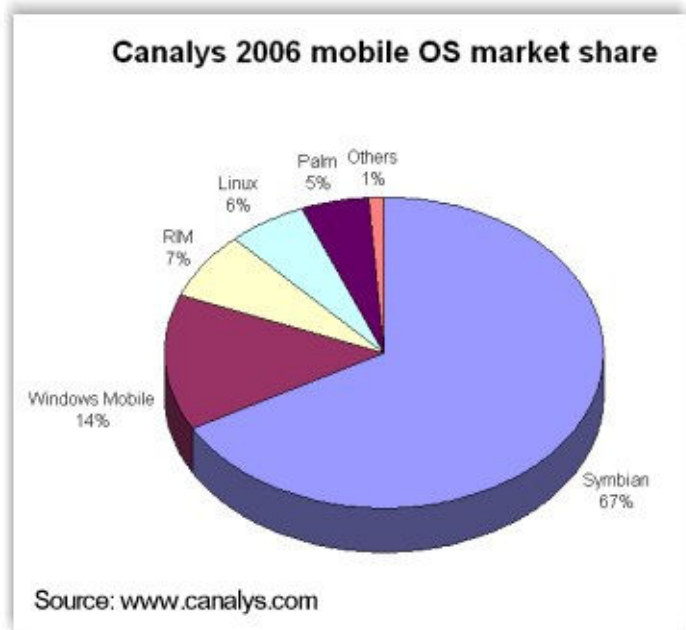
### Growth in open OS will shift zones of influence

*First published: 3/13/2007 13:13*

The move to open mobile operating systems is accelerating, driven by growing awareness in the operator community that these platforms can lower their costs and encourage the development of a value-added services ecosystem.

Vodafone, for instance, [[http://news.com.com/As+mobile+phones+grow+more+complex,+carriers+insist+on+fewer+operating+systems/2100-1039\\_3-6166275.html](http://news.com.com/As+mobile+phones+grow+more+complex,+carriers+insist+on+fewer+operating+systems/2100-1039_3-6166275.html)] stated recently that it intends to focus on three open operating systems in the long-term: Windows Mobile, Symbian Series 60 and Linux. NTT DoCoMo mandated Symbian and Linux to its handset manufacturing partners some time ago. Orange also operates a policy of Windows Mobile, Symbian and Palm OS for its high-end handsets.

According to [<http://www.canalys.com/pr/2007/r2007024.htm>] Canalys, worldwide shipments of open OS smartphones rose 63% from 2005 to 2006, accounting for approximately 64m units. Symbian had the lion's share of this market at 67%, with Microsoft a distant second with 14%. RIM took 3rd place with 7%, Linux with 6% and Palm on 5%. Shipments in the 4th quarter of 2006 rose to more than 18m, suggesting there will be further growth in 2007.



## Additional research notes

The objective of network operators around the world is to source devices at the lowest cost while still providing a platform for deploying compelling value-added services. They also want to minimise their ongoing support costs and ensure their supply chain is strategically managed so as not to become too reliant on any one manufacturer.

Open OS platforms fulfill many of these goals.

While the cost of components in open OS handsets is typically higher than devices produced using a manufacturer's legacy platforms or a reference design from a chipset vendor, the overall R&D investment to develop a new product is falling rapidly.

Chipset manufacturers such as Freescale and TI work closely with the open OS developers and handset vendors to create reference designs which can be re-used and customised across a broad portfolio of devices. This reduces time-to-market and increases the economies of scale for sourcing components. By standardising at this level of the value chain, cost benefits cascade down to subsequent levels, enabling other component providers and software developers to reduce their costs by working on a handful of mass volume platforms.

The result is a more competitive handset market, where device vendors can tap into a range of standard components and use them across a portfolio of devices. This encourages price competition among the manufacturers as they play-off against each other to win major supply contracts with the operators. As standardisation increases, the barriers to entry fall for new manufacturers who want to use open platforms, thereby limiting the operator's reliance on individual handset companies.

AT&T, for instance, [<http://www.phonescoop.com/news/item.php?n=2107>] recently announced it was launching a Windows Mobile device from Chinese manufacturer Amoi - a relative newcomer to open OS platforms. HTC, a comparatively small Taiwanese manufacturer, has also established itself as the leading manufacturer of Windows Mobile devices from a virtually standing start.

Symbian has been in business for nearly 10 years and Microsoft has been offering a mobile platform for almost the same length of time, but it has taken some time for these OS to gain mainstream acceptance. Growth has been constrained by the cost of the high-end processors and components required by open OS devices, a tendency for manufacturers to focus their products on lower volume business markets and the relative complexity of their user experience.

These issues are gradually being resolved and as each metric starts to fall into line with industry expectations, a period of rapid growth for open OS platforms beckons. IDC

## Additional research notes

[<http://www.symbian.com/about/fastfacts/fastfacts.html>] predicts open OS smartphones will reach annual volumes of approximately 250m by 2010.

This will create new strategic challenges for handset manufacturers and network operators. Traditionally, both operators and device vendors have been concerned by control of the applications and interface layer. This is seen as a key part of the mobile experience. Companies which can exert the most control over this area capture the majority of the value in the business.

Symbian, the leading provider of open OS platforms, was formed by Nokia, Ericsson, Motorola and Psion in 1998 in direct response to the perceived threat from Microsoft's mobile strategy. These major manufacturers did not want to see their businesses commoditised by Microsoft, as had occurred in the PC industry.

However, the direction and ownership of Symbian itself has been dictated largely by fear of ceding control of the interface layer. Symbian originally began work on several interface specifications which would standardise screen dimensions and applications packages. These would have been available to all manufacturers.

Instead, Symbian's handset manufacturer investors forced the company to step back from developing interfaces and concentrate instead on the core OS. Nokia and Ericsson developed their own interface layers - Series 60 and UIQ - which they began to license separately. The twists continued as Ericsson sold UIQ back to Symbian, where it ran as an independent subsidiary. To complete the circle, Sony Ericsson recently re-acquired UIQ and it is now part of the Swedish-Japanese joint venture once again.

Nokia's third party licensing efforts for Series 60 have stalled and the Finnish manufacturer now accounts for the vast majority of Series 60 shipments. It has also increased its stake in Symbian, leading to concerns that the OS provider has essentially become a Nokia subsidiary.

However, operator's concerns over whether open OS platforms provide manufacturers with too much influence over the interface layer seem to be alleviating. Vodafone is working with Nokia to deploy a customised version of Series 60 across its handset portfolio. Hutchison 3G has launched its first X-Series handset on both UIQ and Series 60 devices.

The traditional perception of open OS meaning an identikit UI dictated by the software developer or handset vendor has been replaced by an understanding that open platforms can actually equate to greater customisation potential and lower costs.

## Additional research notes

Of course, handset manufacturers aren't simply abandoning their efforts to maintain their share of the value. Instead, there is an increasing focus on providing a few key applications closely linked to the hardware design and software package. Research In Motion has advocated this strategy for some time, focusing on specialist devices closely linked to its enterprise email service and commanding a considerable premium for doing so.

Nokia is also exploring several connected services which will enable it to increase the attractiveness of its devices to consumers, generate revenues from subscriptions and control the user experience. It acquired navigation software vendor Gate5 in 2006 and has started embedding the technology, along with GPS functionality, in some its handsets. Existing users can also download the application for free. Nokia derives its revenues from selling additional mapping components and location guides through an integrated mobile storefront.

Apple, is [<http://www.mobileuserexperience.com/?p=330>] ploughing its own furrow with by investing heavily in developing its own operating system, UI, applications package and a suite of connected services. It believes it can differentiate through unique design and user experience, enabling it to command a premium price for its products.

Palm is also steering towards a similar strategy. Last year it bought back the rights to the operating system it previously owned from Access, the Japanese company which acquired former Palm subsidiary PalmSource. There are rumours it is now working on developing its own next generation platform at the same time as producing Windows Mobile smartphones. Palm hired the highly regarded Apple UI engineer Paul Mercer a few weeks ago.

Developers have been clamouring for truly open and standardised platforms for years. The cost and complexity of deploying an application across the full range of devices available in just a single national market is prohibitive for all but the largest companies. This fragmentation of software platforms and hardware specifications also holds back innovation by forcing developers to use 'lowest common denominator' options like simple XHTML sites or basic Java applications to reach the largest audience.

This impacts the economics of developing mobile applications in several ways: firstly, it is difficult to achieve volume distribution without maintaining numerous versions for different handsets. It also means each application can typically do less, so developers can't charge as much for it. It's a negative spiral of lower revenues per application, less investment and increasing costs.

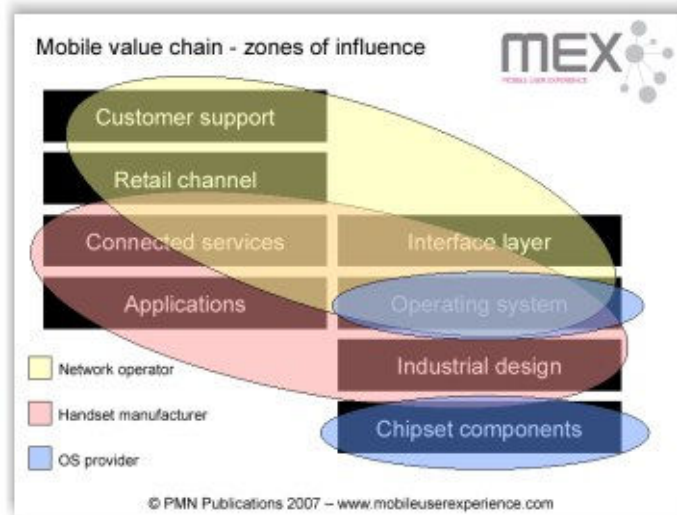
As the move towards standardised platforms increases, developers should find their lives becoming easier. Canals predicts a cumulative total of 1 billion open OS smartphones will

## Additional research notes

have shipped by 2012, providing third party developers with a truly mass audience to target through just a few OS platforms.

I believe the adoption of open OS platforms will cause a change in the dynamics of differentiation in the mobile value chain. Operators will need to differentiate through price competition, customer service, supporting the most active developer communities and providing access to the widest range of applications. Handset manufacturers will focus increasingly on industrial design and a portfolio of connected services tailored specifically for their devices. Platform vendors will find themselves increasingly concerned with pre-integration relationships with chipset vendors, providing tools to developer communities and standardisation collaborations.

The diagram below illustrates. You can download a PDF copy [<http://www.pmn.co.uk/mobilevaluechain.pdf>] here.



**Web link for further discussion of this topic**

<http://www.mobileuserexperience.com/?p=365>



## Additional research notes

### Where is the colour in the monochrome mobile industry?

*First published: 2/28/2007 11:17*

Amid the aesthetic assault and branding riot of the trade show floor, I was drawn to NTT DoCoMo's stand at 3GSM this year. The gaudy, diverse colours of the handsets on display lured me from the aisle and proved sufficiently distracting to make me late for my next meeting.

DoCoMo's collection was displayed in glass cases like precious jewellery. There were reds and yellows, stripes and polka dots, finishes in gloss and matt - such variety!

I thought to myself: "Surely these can't be DoCoMo's standard range?" Unfortunately I didn't have time to speak to anyone on the stand, so I did some investigating once I got back to the office and it turns out these are indeed part of the operator's public offering.

If I'd spent more time in Japan recently perhaps I wouldn't have been so surprised. As I've expanded my research into this, I've found these multi-coloured handsets are very much the norm in the Japanese market.

The contrast with the UK and other Western European markets is remarkable. To illustrate this, I've captured screen shots from the web-sites of the 3 largest operators in both the UK (Vodafone, O2 and Orange) and Japan (DoCoMo, KDDI and Softbank). They show the most popular 3G devices offered by each company.

## Additional research notes

### UK



### Japan



## Additional research notes

The handsets available to UK customers rarely step outside the familiar monotony of monochrome: black, grey and white. There are occasional metallics - silver or bronze - and a few pink handsets, no doubt designed by men for a female market they are clearly out-of-touch with. Also, each handset is typically only available in a single colour option. This is sometimes customised for the individual operator, to differentiate Nokia's on O2's network from Nokia's on Vodafone's network.

Can you imagine a car manufacturer only selling vehicles in it's corporate colours? If you wanted a blue car, you would have to go to Ford and if you wanted a red one you would go to Honda.

In Japan, almost every handset sold is available in at least three colour options. These range from lime green to banana yellow.



This product for young teenagers is available in five variations of two-tone colour.

The marked difference in the palette of colours available to customers in these two markets got me thinking about how this might affect the user experience. From a purely personal perspective, I found myself much more drawn to the Japanese offerings. The variety of colours created a feeling of desire totally absent when looking at the monochrome ranges offered by the UK companies.

Research has been conducted on the effect colours have on our emotional state. Richard Keller presented the findings of a 1976 study in a paper entitled 'The Use of Space--Some Physiological and Philosophical Aspects' at the Third International Architectural Psychology Conference, University Louis Pasteur, Strasbourg, France. His experiment involved separate

## Additional research notes

groups of six men and six women, who were placed in a room with a grey colour scheme and a one with a colourful, complex scheme.

Keller recorded the pulse rates and subjective reactions of both groups. Pulse rates were higher for both men and women in the grey room, while men also reported themselves more bored and stressed in the grey room.

This [<http://www.colormatters.com/khouw.html>] article by Natalie Khouw of 'Color Matters' provides more background on how colour affects our emotions, particularly the difference in reactions between men and women.

Clearly most of us react to colour. It is one of the key ways we demonstrate our identity to the world: our clothes, the interiors of our houses, our cars and even the colour of the make-up we wear tells others about our style preferences and our moods.

It has always amazed me the mobile industry has largely failed to capitalise on this most basic of personalisation opportunities.

Expanding the range of colours in a product portfolio is not without its challenges: how do you manage stock control to ensure you don't over-supply the least popular colours? How can you ensure your colour scheme remains unique? How do you plan colour options for international markets where local culture might incline the population towards particular hues and rule out others?

However, it is clearly achievable, as the Japanese example demonstrates. Perhaps the answer is in the different structure of the Japanese value chain? The unique relationship between handset manufacturers and network operators in Japan is well documented: the carriers exercise far more control over handset design and specifications, providing the manufacturers with detailed guidelines on all aspects of the product, jointly investing in new technologies and supplying customised software platforms.

In contrast, most Western operators look to the manufacturers to innovate their own designs and then tweak the software, interface and some basic branding elements for individual networks.

I find this bizarre. In the Japanese market, where network operators have the dominant role, there are a diverse range of handset colours. In most western markets, where manufacturers have greater influence, the colour options are far more limited. Colour adds value to the hardware brand relationship, so why are device vendors failing to seize this opportunity to

## Additional research notes

enhance their relationship with the consumer in markets where they have the greatest potential to influence specifications?

There are examples of manufacturers experimenting with colour in the UK and other developed Western countries. Motorola, for instance, extended the longevity of its RAZR range by offering the device in red, blue, gold, pink and bronze. It's PEBL handset was also offered in a range of colours.

Nokia updates its 'fashion collection' on an annual basis, offering handsets in a patterned mixture of pink, beige and gold (yes, it is about as hideous as it sounds). Palm also offered an exclusive range of orange, red, white and grey when it launched the Treo 680 smartphone, reserving the colour options for customers who purchased direct from the manufacturer. However, it recently agreed a deal with AT&T, which will see the US operator become the exclusive distributor for the colour editions.

Manufacturers certainly aren't oblivious to the potential of personalisation. Many - like Nokia and Sony Ericsson - have offered numerous handsets with replaceable fascias, allowing users to choose from an almost infinite range of different designs. Visit any electronics or accessories retailer in London and you'll find fascias decorated with everything from the England flag to pictures of famous singers.

However, these have tended to be low-end devices aimed at younger customers. There is also something inherently cheapening in the process of removing the case from your handset, revealing its circuit boards and bodging the new fascia together. There's a strong analogy with the drawing back of the curtain in the Wizard of Oz - the sense of mystery and the value associated with your sleek new handset vanishes in the DIY nature of the activity.

As a first step, I'd like to see every mobile handset offered in at least 3 distinct colours as a matter of course - and I don't mean black, grey and white. Manufacturers should seek to develop their own palettes, in the same way FMCG brands and vehicle manufacturers protect their unique colour options. As a product comes towards the end of its lifecycle, there will also be opportunities to offer limited editions, like Motorola's pioneering approach with the RAZR.

I think there is also an opportunity to expand this further by providing customisation at the point-of-sale as a value added service. How much would a customer be willing to pay to receive their handset in a unique colour? Personally, I'd be willing to pay a fairly significant premium - say GBP 20 - for this option.

The key would be the way in which it was offered - the customer should pick the colour from a swatch book, indicate their preference to the retailer and then wait a few minutes while the

## Additional research notes

handset is customised out-of-sight in a workshop at the back of the store. The device would then be presented in its box and the sense of value and mystery would be preserved - the Wizard would remain hidden by his curtains. It's all about the value of the experience (see my previous research note entitled [<http://www.mobileuserexperience.com/?p=274>] 'A vision for the retail experience').

This customisation process would be easy with snap-on fascias, but many of the latest thin handsets are the product of advanced manufacturing techniques where modular plastics fascias are not an option. To personalise these devices at the point-of-sale would have an impact throughout the value chain. The devices would have to be supplied to the retailer in kit form, requiring a change in the manufacturing process. The retailer would also need to hire technicians with a certain skill set and there would be capital expenditure on customisation equipment.

This is something where manufacturers could take the lead. Nokia, Sony Ericsson and others are opening flagship shops in key retail locations around the world. They could combine these direct customer touchpoints with their control of the manufacturing process to offer an exclusive in-store customisation service where users can choose from a wide range of exterior finishes.

Web link for further discussion of this topic

<http://www.mobileuserexperience.com/?p=359>

## Qualcomm gains traction with O2 uiOne handset

*First published: 9/5/2006 11:09*

[<http://shop.o2.co.uk>] O2 has released its first handset to use Qualcomm's [<http://brew.qualcomm.com/brew/en/about/uione.html>] uiOne interface solution. The handset - known as Ice - is a 3G monobloc design with a white casing and 1.3 megapixel camera. uiOne enables users to customise the device with visual elements such as wallpapers and menu themes, shortcuts to their favourite mobile services and receive 'pushed' promotions for new content direct to their home-screen.

The Qualcomm platform has been built using technology acquired when the US company purchased Trigenix, a British mobile software developer. Cambridge-based Trigenix was an early pioneer of handset personalisation, recording customer wins with numerous European operators. After its purchase by Qualcomm, the company appeared to lose traction as the platform was re-engineered to integrate with uiOne.

## Additional research notes

uiOne has recently been chosen by Alltel, Telecom New Zealand and now O2. The British operator is planning a range of devices using the technology. The Ice handset is manufactured by [<http://www.pantech.com>] Pantech.

### Web link for further discussion of this topic

<http://www.mobileuserexperience.com/?p=292>

## Segmentation is a step, individualism is the goal

*First published: 3/31/2006 11:06*

I've been thinking about segmentation recently and was asked to provide some comments on the issue for an article.

Most mobile services are still not structured in a way which reflects customer's behavioural patterns. One of the biggest challenges operators face when trying to effectively segment their customer base is evolving their approach from one predicated on technological segmentation to a model built around behavioural understanding. This is an inherently difficult task because the very concept of 'segments' is incompatible with the random and often illogical ways in which customers identify themselves.

While an operator may find it useful for their own purposes to divide the market into neatly ordered segments with particular usage requirements, customer behaviour often transcends these boundaries and, far from improving the customer experience, a poorly implemented segmentation approach can actually lead to additional frustration and lower overall satisfaction.

In the long-term, operators will need to focus on providing a personalisation architecture which enables customers to define their own requirements - from tariffs to mobile multimedia services. To achieve this, the industry will need to evolve from the view that handing more control to the customer poses a threat to revenue and recognise future growth will be directly proportional to the freedom with which subscribers can build their own mobile experiences.

### Web link for further discussion of this topic

<http://www.mobileuserexperience.com/?p=172>

## Additional research notes

### The MEX guide to user experience success

*First published: 10/18/2006 16:02*

#### **Choose a partner, not just a platform**

Regardless of where you sit within the mobile value chain - handset manufacturer, mobile operator or software developer - you will find yourself making choices about 'platforms'. This is one of the most loosely defined terms in the industry, applied to everything from operating systems to carrier networks. The term implies something greater than the sum of its parts, such as software which benefits from compatibility with third party applications or an alliance of companies committed to furthering particular strategic objectives.

Indeed, the most powerful platforms are those which combine technological partnerships with a strong business relationship. A successful platform strategy will leverage the strengths of several technologies and companies to help improve the user experience and - crucially - enable customers themselves to tailor their experience.

The complexity of meeting diverse customer requirements - whether you are a small software developer or a global service provider - is immense and only through building a platform which can adapt to these needs and encourages additional innovation will you be able to provide a compelling experience for all of your customers.

#### **Enough flexibility to deliver a differentiated and constantly evolving experience**

Consider the example of an operator which wants to increase data revenues. NTT DoCoMo, the largest network in the Japanese market, has been one of the most successful in this area. It's approach is characterised by two main priorities: ensuring consistency and compatibility across its basic platform specifications and encouraging diversity, competition and third party innovation in all other areas.

In many ways DoCoMo has married the best elements of two opposing strategies: it has fostered openness and an eco-system of content and application partners, but retained control over the specifications of its handsets and network technology.

DoCoMo has achieved this by working closely with a range of partners. It collaborates with equipment vendors such as handset manufacturers and infrastructure suppliers, even investing





## Additional research notes

directly in some of these businesses. With handsets, for instance, it has defined a set of minimum software requirements for devices on its network. For 3G products, these include use of a Linux-based or Symbian operating systems, Adobe's Flash player and support for certain video and audio formats.

By combining technologies from a range of different suppliers, but co-ordinating supplier activities to ensure compatibility, DoCoMo provides content and application providers with an ideal environment for launching additional innovations. Content developers can create services for use on DoCoMo's handsets confident they will work across all devices on the network and knowing there is a substantial installed base as a target market.

This enables customers to tailor their own mobile experience with unique applications, images and sounds. The result is a subscriber base which feels as if their mobile service reflects their individual needs. For DoCoMo, which takes a percentage of revenues from the content sold and charges for the transmission of data over its network, this translates into higher revenues.

The basic principles of a flexible platform approach can be applied to businesses throughout the mobile industry, not just those in the operator community. When you're building your products or services, start with getting the basics right and then ensure there is scope within the platform for expansion, improvements and - above all else - the ability to respond to changing customer requirements.

A platform is only ever as good as its ability to service your customers; no amount of technology and patented intellectual property is substitute for delighted users.

### **Ensure your partners understand and grow with your vision**

Many companies looking to make a business in the mobile industry, particularly new players in the content sector, will recognise building and managing the complexities of technology a platform is not their core area of expertise. There are numerous solutions providers offering everything from outsourced payment mechanisms to complete environments for authoring, developing and delivering applications.

Qualcomm, for instance, provides the tools, delivery server and client software required for developing applications compatible with its BREW technology. It has seeded the market with BREW handsets through its relationships with device manufacturers and works with network operators to supply the infrastructure for delivering and charging for this content. Qualcomm also handles business relationships with content providers, ensuring they receive a percentage of revenues when their service is purchased by a user.

## Additional research notes

Nokia offers a similar programme through its Forum Nokia organisation.

For content providers, partners like these can be a valuable source of marketing assistance and technical expertise, eliminating much of the cost and time involved in reaching a large number of customers.

However, consideration of the impact on customer experience must be the basis for any decision about platform partners. You must ask yourself questions, such as:

- Do the partners you are working with understand your vision and relationship with your users?
- Could your partners' strategies come into conflict with your customer experience ambitions?
- Do their platforms offer enough flexibility to allow you to differentiate your own products and services from the competition?

At the heart of successful partner relationships is openness over technology and strategy. If you are a network operator which invests in extensive customer research, share this information with all your partners - if they understand your customers, they'll be better equipped to help drive your business objectives. For smaller players in the software and content space, ensure you are communicating your goals clearly to the partners which control your distribution channels - if they don't know what's happening at the ground level, they can't adapt to improve the overall customer experience.

It is also worth remembering that customer service and support can be your most valuable source of insight into future platform strategy. While many companies see this function purely as cost centre, it is a goldmine of information to help you understand how your partnership and platform must evolve to better meet your customer requirements.

### **Open the platform to third party and customer innovation**

SMS is frequently cited as an example of a mobile success story which grew without any planning by the industry. While that over-simplifies the true picture, it is certainly true that peer-to-peer messaging was never anticipated as the biggest use of SMS. It is a service which customers picked up on and put to their own uses, creating a revenue stream and communications phenomena mobile executives could never have predicted.

## Additional research notes

If you provide your customers and partners with the basic building blocks it is amazing what innovations they will create. One of the most common mistakes made by companies when they first start investing in customer experience is to assume it means having more direct control over how their user's interact with their products.

In many cases the opposite is true. Giving customers and third party developers the freedom to customise will allow a service to evolve into an entity better equipped to serve the users. The customers themselves will also feel more loyalty towards the product because they have participated in creating the experience.

Google is pioneering this approach with services designed for desktop PCs and is also starting to experiment in the mobile environment. It allows developers to use its basic platforms, such as mapping and search, to build their own customised applications. The resulting 'mash-ups' are often tailored for very specific markets, which Google would otherwise have been unable to identify or service itself.

This openness to third party innovation and customisation is particularly important for operators and handset manufacturers. They will need to develop tools, in collaboration with software providers, which allow customers to take control of their own experience. As competition intensifies in developed markets, it will quickly become apparent the best way to meet the diversity of customer needs is not by trying to second-guess the behaviour of all your users, but by offering simple ways for them to define their own mobile environment.

## Additional research notes

### Summary

- A successful platform strategy will leverage the strengths of several technologies and companies to help improve the user experience and - crucially - enable customers themselves to tailor their experience.
- Start with getting the basics right and then ensure there is scope within the platform for expansion, improvements and - above all else - the ability to respond to changing customer requirements.
- A platform is only ever as good as its ability to service your customers.
- Share information with all your partners - if they understand your customers, they'll be better equipped to help drive your business objectives.
- Customer service and support can be your most valuable source of insight into future platform strategy.
- One of the most common mistakes made by companies when they first start investing in customer experience is to assume it means having more direct control over how their user's interact with their products.

### Web link for further discussion of this topic

<http://www.mobileuserexperience.com/?p=308>

## Stat Spot

No Stat Spots are specifically related to this topic, but you can download a PDF containing a wide range of user experience stats from our web-site at [www.pmn.co.uk](http://www.pmn.co.uk).