

YOUR MOBILE FUTURE: INSIDE THE WIRELESS REVOLUTION 7.25.13

A recap of the discussion featuring...



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Accenture's Managing Director, North America Network Services Lead. He assists clients such as AT&T, Verizon, and US Cellular with all their wireless networking needs. Before Accenture, he held several management positions at Sprint. He is an Advisor to the Federal Communications Commission (FCC) Technical Advisory Council. He loves global travel and mountain climbing.



David Kimbell

Chief Marketing Officer, US Cellular. He oversees the company's customer and product strategy, sales operations, brand, field marketing, strategic partnerships and analytical services teams. Prior to joining U.S. Cellular in 2011, he was CMO at Seventh Generation, and before that he held leadership roles at PepsiCo and Procter & Gamble. Dave loves anything in or near the water, especially water skiing.



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Paul Steinberg

Chief Technology Officer, Motorola Solutions, is in charge of planning and implementing Motorola's wireless solutions for government, retail and other business enterprises. He joined Motorola in 1992, after spending time at Bell Laboratories. He is also a member of the Federal Communications Commission's Technical Advisory Council. He holds several US patents, and is an avid Chicago sports fan.



Roger O. Crockett

President of R.O. Crockett Leadership Advisory, he is a speaker, writer and adviser on business leadership issues. He helps companies create thought leaders by providing strategic thought-leadership solutions. Previously, he was an award-winning journalist for *BusinessWeek* magazine, where he closely covered the wireless industry. He is editor-in-chief of *In The Lead* and an avid golfer.



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Your Wireless Future: Cellphone Evolution

1984: Motorola's DYNATAC becomes commercially available.



1996: Motorola's StarTac hits the market, revolutionizing the size of phones and selling 60 million units.



2004: The sleek Razr is introduced, becoming the best-selling clamshell phone ever with 130 million sold.



2004: The total number of mobile phones in the US surpasses the number of conventional land-based phone lines.

2005: RIM introduces the Blackberry 8700 series, a device with phone features plus the popular full keyboard. "Crackberry" was born



2007: Apple's iPhone transforms how we use mobile phones.



Your Wireless Future: Insider Takeaways

(Edited from the discussion)



Wireless technology has radically transformed our lives ... at work, at home, and beyond. But the revolution is far from over. We are marching toward a completely mobile world—a place where nearly everything we do happens over the airwaves. Industries from retail to banking to automotive, entertainment and government are being turned on their head. Your life will be fundamentally altered in the years to come.

Innovation?

A couple of years ago, we had a wave of smartphones, we had the introduction of tablets like the iPad, we saw the introduction of 4G and LTE networks. But what's really new these days? What's transformative? One transformative movement is the transition from phones as smart devices to phones and other devices (DVRs, game consoles, iPads) becoming platforms that control your environment: the home, your car, your office. Because of this controlling power these future devices are referred to as a "God box" because they connect you to everything.

Connected everything



The connected concept extends to hospitals and banks and retail. With the connected retailer, for example, a shopper or store associate is never without information. Motorola uses smart infrastructure with RFID and video analytics to enable this infrastructure. The retailer of the future knows exactly where all his/her inventory is located. We know a consumer's history. We can dispatch someone to greet a customer at the door. If it's a wine retailer, they might greet the customer with a personalized guide to preferred wines. The retailer can know within 3 feet where a shopper is in the store at any given time. In the future, the infrastructure around the human being gets a lot more friendly and customizable. The technology is there.



It's there in the home as well. Five years ago, there were only five connected devices in the home. Now it's over 30. From your garage opener to your smart phone to your refrigerator to your thermostat and alarm system. There is a home system called NEST. It's a smart thermostat that learns how you consume energy at home. There could be millions of those kinds of smart systems coming out and they are all going to be connected.

Personal Privacy

The FCC is trying to sort out whether the consumer knows that this data is floating around. When you open your garage door with your password, where does that data go? The homeowner worries when they are out of town and didn't turn on their lights at home for five days because someone has access to that data. They could use that to their advantage to invade your house.

On the other hand, in the work environment, employees are concerned about where their data goes now when they are using company networks and equipment. There was a time where data sat inside the company and now its moving to the cloud and its not clear where that cloud (servers) sit and who owns it. Company management is also worried about what happens to employee data and customer data.

Homeland Security



In a terrorist attack situation networks get bombarded. If police had to rely on regular networks we all use they would not be able to function. If they were relying on the same shared spectrum as everyone else, then public safety would be stuck in times of crisis like the Boston bombings or 9-11. So there is a separate 20 MHz of spectrum allocated for police and other first-responders for emergency situations.

Customer Relationships



Ultimately the customer is going to own the customer and decide what they want, and it will be who is bringing the most value that wins. We think carriers such as US Cellular are scratching the surface connecting more of people's lives together. We think there is a lot of opportunity to enhance the network experience. The first thing wireless users are making their decision on is the network. It's not who has the biggest network, but it's can I get service where I need it? In my home and my basement. There is a lot of room for wireless carriers such as US Cellular, but carriers will not totally own the relationship. Automakers will be a big part of it, as well as the device makers like Apple and Internet companies like Google.



Carriers will be a big part of it. But there are headwinds. There are application creators that provide an app that runs over the top of the carrier service. And it's free a lot of the time. For example, increasingly, folks are moving away from texting to over-the-top apps that enable the user to text for free. That is disruptive to the current business models.

Spectrum

Spectrum is akin to real estate in the air. You must have real estate to put up a building, to set up shop and operate. But the regulations around spectrum holding and licensing came around 50 years ago and we are still using the same policies, but technology has moved on. There are ways to share spectrum and to use it more efficiently and effectively than we do today. For one owner of spectrum to be able to sit on it, even if they are not using it, has to change.

Mobile Marketing



It's a little bit of the Wild West now in wireless marketing because most of the ads are free. As the device becomes more of an entertainment and lifestyle device more people will want a piece of it. Who is going to fund all the growing usage and applications? It is not going to be solely the consumer who pays the carrier one to one. It could be the ESPNs of the world who want to deliver content to the end user and will pay the carrier for that access.