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25** | **CUSTOMER
VALUE LEADER**
Maximizing the Price/Performance ROI for Customers

*RECOGNIZED FOR BEST PRACTICES IN THE
GLOBAL IOT-DRIVEN BUILDING ENERGY
MANAGEMENT INDUSTRY*

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Best Practices Criteria for World-class Performance

Frost & Sullivan applies a rigorous analytical process to evaluate multiple nominees for each recognition category before determining the final recognition recipient. The process involves a detailed evaluation of best practices criteria across two dimensions for each nominated company. Planon excels in many of the criteria in the IoT-driven building energy management space.

RECOGNITION CRITERIA	
<i>Business Impact</i>	<i>Customer Impact</i>
Financial Performance	Price/Performance Value
Customer Acquisition	Customer Purchase Experience
Operational Efficiency	Customer Ownership Experience
Growth Potential	Customer Service Experience
Human Capital	Brand Equity

Industry Challenges

The smart buildings industry has long been evolving with diverse solutions and vendors, leading to a fragmented ecosystem that complicates interoperability. As more and more platforms are introduced, building owners, operators, and service providers face increasing challenges in managing incompatible building management systems (BMS) across their portfolios, creating inefficiencies and operational complexities. This has underscored the need for foundational smart building platforms that unify data, enhance automation, and provide deeper insights. While vendors expand capabilities through acquisitions, Frost & Sullivan notes that organizations managing large portfolios struggle with integrating disparate technologies, platforms, and stakeholders. Customers now demand open platforms that follow standardized processes to ensure seamless system optimization; yet legacy infrastructure and non-standard communication protocols continue to remain major roadblocks.

Cost efficiency has always been a priority, but the demand for energy-efficient solutions has surged amid rising and volatile energy prices. Organizations are also under increasing regulatory, economic, and social pressure to reduce their carbon footprint and enhance sustainability reporting. Meeting these expectations requires integrating financial and non-financial data while leveraging IoT-driven building energy management to optimize energy use.

Beyond cost and compliance, cybersecurity and data privacy concerns pose significant risks, as IoT devices generate vast amounts of sensitive information. In addition, ensuring system reliability and maintenance is crucial to preventing disruptions in critical operations. Furthermore, AI-powered data-driven decision-

making remains underutilized, as many organizations struggle to translate raw IoT data into actionable insights. Lastly, user adoption presents another challenge, with facility managers often resisting new technologies due to a lack of training and change management strategies.

Venture capital and corporate investments in smart building start-ups continue to surge, with cumulative funding from 2020 to 2024 totaling \$37.5 billion, indicating a strong appetite for AI-driven HVAC optimization, building energy management, IoT platforms, digital twins, and other technologies. Frost & Sullivan estimates the building energy management systems (BEMS) market to reach \$13.57 billion by 2030, growing at a compound annual growth rate (CAGR) of 11.2% from 2024.¹ As the market continues to evolve, the need for scalable, secure, and intelligent building energy management solutions will grow - making integration, automation, and data-driven insights the foundation of future-ready smart buildings.

Powering Sustainable Buildings Through Energy and Sustainability Management

Planon has a 40-year history and 10 years of experience in the energy and sustainability domain. With offices in 16 countries, the company offers a global solution that manages 300,000 data points from 50,000 buildings. In today's rapidly evolving real estate and facility management landscape, organizations are under immense pressure to enhance energy efficiency, cut operational costs, and meet stringent sustainability regulations. Planon's Energy & Sustainability Management (ESM) solution offers a unified, future-proof approach to building operations by seamlessly integrating data-driven analytics and IoT-powered real-time energy insights into a single platform. By centralizing and digitizing data, the company enables businesses to make smarter, more strategic decisions, enhance sustainability efforts, and maximize cost efficiency. With the 2 vital features of Energy Performance Management and Sustainability and Cost Management, the solution provides a fully integrated system for tracking, analyzing, and optimizing energy performance, allowing organizations to monitor utility usage, carbon emissions, and cost trends in real time. With built-in capabilities to set energy efficiency targets, track progress, and enable compliance with evolving environmental, social, and governance (ESG) regulations, Planon makes sustainability management both actionable and accessible, empowering businesses to easily achieve their financial and environmental goals.

Beyond enabling regulatory compliance, the company's ESM solution delivers substantial cost savings through advanced analytics and real-time performance monitoring. With features such as automated utility bill reconciliation, predictive energy optimization, and workflow automation, businesses can significantly reduce waste and drive long-term energy efficiency gains. The solution's user-friendly dashboards allow organizations to visualize cross-portfolio energy consumption, emissions data, and financial impact, ensuring decision-makers have instant access to the insights required for strategic planning.

Planon's strategy for delivering the best value to customers revolves around unifying, automating, and future-proofing building energy management with an open, interoperable platform. Its energy and sustainability management are designed to simplify and reduce costs by eliminating inefficiencies in real estate and facility management. By providing a single, centralized platform, organizations can streamline

¹ Building Energy Management System Market, Global, 2024-2030, Frost & Sullivan, Published in December 2024

workflows, improve collaboration, and eliminate data silos, resulting in lower operational expenses and improved decision-making. The platform's intuitive design ensures businesses can digitally transform their operations with minimal complexity, reducing overheads while accelerating the adoption of energy-efficient practices.

Beyond cost savings, Planon delivers a future-proof solution that ensures organizations remain adaptable to evolving regulatory standards, market trends, and sustainability goals. With growing pressure to meet ESG standards, organizations require solutions that can seamlessly integrate sustainability data. Planon's platform empowers businesses to remain compliant while unlocking new opportunities for efficiency and cost reduction.

Flexibility and scalability are at the core of the company's value proposition. Organizations can start small with foundational capabilities and expand over time, adapting the platform to their unique needs. Whether adopting regional compliance requirements, integrating with existing IT infrastructures, or leveraging preferred smart building technologies, Planon offers an adaptable and future-ready framework that aligns with an organization's evolving climate and environment strategy. At the core of the company's value proposition is its powerful, open-system architecture, which serves as a single source of truth for building data. This unified approach enables businesses to efficiently manage sustainability initiatives, enhance IT security, and drive cross-operational efficiency. By leveraging real-time data insights, organizations can proactively identify inefficiencies, optimize resource allocation, and automate energy-saving strategies.

Open and Interoperable Platform: Leading the Future of Smart and Sustainable Building Management

As the global landscape shifts to smart, data-driven, and sustainable building operations, Planon

“Planon’s open, interoperable platform sets it apart from competitors by seamlessly connecting with ERP systems, IoT sensors, BMS, corporate reporting tools, financial management systems, and third-party sustainability frameworks. Unlike traditional point solutions that require multiple software tools and costly integrations, Planon offers a fully unified system that consolidates real estate, facility operations, and energy management into a single, data-driven interface.”

**- Anirudh Bhaskaran
Industry Principal, Energy &
Environment**

stands at the forefront of innovation, ensuring businesses remain agile, cost-efficient, and environmentally responsible. The company continues to enhance its ESM solution with advanced capabilities that drive energy efficiency and sustainability. The platform now features enhanced analytics for energy savings and optimization, visualized through an intuitive dashboard that includes customizable charting and reporting tools. Utility Bill Management ensures accurate monitoring by comparing invoices with actual energy consumption, helping organizations identify discrepancies and optimize costs. In addition, whole-life carbon and circularity insights provide a deeper understanding of sustainable building practices, enabling businesses to assess the embodied carbon

and circularity potential of their properties to support long-term environmental goals.

A key differentiator of Planon's ESM solution is its seamless integration with its Real Estate Management (REM), Space & Workplace Services Management (SWSM), and Asset & Maintenance Management

(AMM) products, creating a fully unified building operations platform. This integration delivers holistic insights and improved decision-making, allowing organizations to combine utility data with space utilization metrics and comfort scores to optimize space plans while balancing user experience and energy efficiency. The platform also enables cross-operational control, where automated alerts for energy leaks or excessive consumption trigger maintenance workflows to address issues proactively, minimizing downtime and long-term costs.

Planon's open, interoperable platform sets it apart from competitors by seamlessly connecting with ERP systems, IoT sensors, BMS, corporate reporting tools, financial management systems, and third-party sustainability frameworks. Unlike traditional point solutions that require multiple software tools and costly integrations, Planon offers a fully unified system that consolidates real estate, facility operations, and energy management into a single, data-driven interface. This holistic and future-ready approach enables organizations to leverage their existing technology ecosystem while benefiting from cutting-edge innovations, ensuring seamless workflow automation, enhanced operational efficiency, and sustainable prosperity.

Planon's commitment to innovation, industry leadership, and customer-driven solutions has established it as a trusted global brand. With a customer base exceeding 3,250 organizations worldwide, the company has built a reputation for delivering high-performance, reliable, and scalable building management solutions. Its focus on future-ready solutions ensures businesses remain competitive in an increasingly digital and sustainability-conscious market. Planon's strategic partnerships further strengthen its market position. Collaborations with Schneider Electric, SAP, KPMG, and EY provide businesses access to an expert ecosystem that connects smart buildings with broader corporate strategies. Furthermore, Planon's industry-specific approach ensures tailored solutions for real estate, corporate workplaces, universities, and facility service providers, maximizing business value across different sectors.

Frost & Sullivan commends Planon's leadership in data-driven building energy management, ensuring businesses achieve energy efficiency, cost optimization, and long-term sustainability. The company's open-platform approach seamlessly integrates business productivity tools with a building's operational technology, positioning organizations to leverage AI advancements and adopt future-ready autonomous AI agents capable of executing complex tasks with minimal human intervention.

Customer-first Strategy: Commitment to Retention and Sustainable Growth

Frost & Sullivan applauds Planon's strategic commitment to delivering exceptional customer value, balancing a customer-oriented approach with market-leading innovation. The company's open and scalable platform empowers organizations to achieve operational efficiency, seamless integration, and long-term sustainability by providing a unified system that aggregates real estate and facility management data from multiple sources, creating a single source of truth for streamlined, data-driven building operations.

Planon's customer-facing processes ensure efficient and consistent acquisition of new customers while enhancing long-term retention and satisfaction. The company's regional account teams, implementation services, and life cycle management processes focus on guiding customers throughout their journeys — from initial onboarding to full-scale adoption and continued optimization. This proactive engagement

begins at the procurement stage, where Planon helps organizations define their software needs and scope. During implementation and adoption, dedicated support teams ensure smooth deployment and user acceptance. When operation commences, Planon's business consultants, customer support teams, and managed services specialists work closely with customers to optimize software configuration, maximize utilization, and explore additional value through continuous innovation.

A testament to Planon's customer-driven approach is its exceptional 97% customer retention rate, underscoring the long-term business value and trust the company has built over more than 40 years. By focusing on customer success, personalized support, and a roadmap for innovation, Planon continues to expand its global customer base while maintaining strong loyalty among existing clients. This customer-first philosophy has been a key driver of the company's consistent growth, brand strength, and industry leadership, ensuring that Planon remains at the forefront of smart and sustainable building management solutions.

Customer-centric Approach: Enhancing Service Excellence and Innovation

Planon's impressive customer service experience is deeply embedded across the customer journey, focusing not only on acquisition, but also on long-term client retention and satisfaction. The company thinks that every employee plays a critical role in ensuring a seamless, efficient, and frictionless customer experience. By offering comprehensive implementation, support, and managed services, Planon enables organizations to maximize the value of their software investments. These services include self-service e-learning, expert-led training, and collaboration with certified system integrators and technology partners, allowing businesses to scale their solutions effortlessly. This customer-first strategy has directly contributed to Planon's year-over-year growth and strong financial performance, reinforcing its position as a trusted leader in smart building and facility management solutions.

A key differentiator of Planon's customer service strategy is its ability to balance a global service approach with localized execution. Planon Professional Services teams operate worldwide, ensuring a consistent, high-quality service framework, while an expanding network of certified partners provides localized expertise and on-the-ground support. The company's Accelerator Implementation Method (AIM), based on PRINCE2 best practices, is applied successfully in thousands of implementations worldwide, ensuring a structured, efficient, and repeatable approach to deployment. Moreover, Planon's life cycle services, which include dedicated implementation teams, business consultants, and application specialists, provide continuous client support, ensuring optimal performance, seamless upgrades, and evolving system enhancements.

Planon's commitment to customer success is exemplified by its high-profile case study with the University of Sunderland, which required a rapid transition to Planon's platform as a replacement for its existing outdated computer-aided facility management (CAFM) system, aiming to avoid renewal costs and enhance operational efficiency. Planon delivered an exceptional customer service experience by providing a pre-configured, out-of-the-box solution that streamlined implementation and ensured full user adoption. Through a collaborative approach, Planon worked closely with the university's Estates team, involving key stakeholders in the selection process and offering hands-on training to ensure a seamless transition. As a result, the university successfully implemented and went live with Planon's Campus Management solution in just 7 weeks, meeting

its strict deadline, reducing costs, and significantly improving process efficiency. What previously took 10 minutes to upload a maintenance issue in the old system now takes seconds, allowing staff to focus on higher-value tasks. With enhanced transparency, better governance, and

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- Anirudh Bhaskaran
Industry Principal, Energy & Environment

streamlined maintenance workflows, the university now benefits from a smarter, data-driven campus experience, reinforcing Planon’s commitment to delivering high-performance, customer-centric solutions.

System reliability and transparency are key pillars of Planon’s service excellence. With a realized uptime of more than 99.9%, the company ensures uninterrupted access to cloud-based services, supporting mission-critical business operations. To further build trust, Planon provides customers full transparency on cloud performance, planned maintenance, and historical uptime through a public dashboard (trust.planoncloud.com). The company’s clients consistently praise its solutions’ stability and reliability, a factor that has strengthened its

competitive edge in the market.

The company continuously refines its solutions through robust customer feedback mechanisms, ensuring its offerings evolve to meet current and future business needs. Each customer has a dedicated account manager to facilitate ongoing engagement, while an in-house 24/7 support desk provides real-time technical assistance. Customers also have access to a dedicated portal for feedback submissions, change requests, and direct communication with Planon’s product teams. In addition, the company organizes annual customer conferences, industry webinars, roundtable discussions, and virtual community events, fostering a collaborative environment where customers can share insights and best practices.

One of the most impactful feedback mechanisms is Planon’s online voting system for customer-driven product innovation. Through this system, customers submit software enhancement ideas, which are periodically voted on by the broader user community. Every quarter, the company analyzes the top 3 voted ideas and integrates them into its product development roadmap, ensuring innovation aligns directly with customer needs. This transparent and participatory approach not only enhances customer satisfaction but also drives product evolution in alignment with real-world requirements.

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Path to Market Leadership: Continued Robust Financial Performance, Strategic Growth, and Future-ready Innovation

Planon has consistently demonstrated robust financial performance, with recurring revenue growth exceeding 11% in 2024 and an annual turnover surpassing €160 million, supported by a double-digit operating margin. The company's sustained success is further reflected in its 20% CAGR since 2021. In 2024, Planon expanded its reach by welcoming 100 new business customers, nearly 100 new employees, and 28 new partners, strengthening its position in the IoT-driven building energy management industry. Schneider Electric's strategic majority acquisition in October 2024 significantly enhanced Planon's market influence, integrating it into a €38 billion global powerhouse. This acquisition provides the company with additional resources, industry expertise, and an expanded global footprint, ensuring long-term growth and stability.

Planon's open-platform strategy is central to its future roadmap, aligning with 4 key industry shifts that will shape the smart building technology landscape: 1) Business Integration — Organizations increasingly demand seamless integration between BEMS and business platforms, including ERP and corporate reporting systems, for streamlined financial, logistic, and compliance processes. 2) Building Management — The need for open integration between BEMS and BMS is growing, enabling organizations to optimize occupant experience, energy efficiency, indoor climate, and health and safety. 3) Productivity Tools — The shift to hybrid workplaces is driving demand for smart BMS that integrate seamlessly with office productivity tools, ensuring efficiency in a digitized work environment. 4) Best-in-Class Applications — Customers seek open platforms that connect with specialized applications, enabling them to leverage niche technologies in a unified smart building management ecosystem.

A notable implementation of Planon's technology is at Sidara's 150 Holborn, one of London's smartest buildings. This flagship project, in collaboration with Schneider Electric, highlights the seamless coexistence of innovation and sustainability. Leveraging the joint Planon and Schneider Electric solutions underscores Sidara's commitment to energy efficiency, real-time data insights, and enhanced occupant experiences, earning the site LEED Platinum and BREEAM New Construction and Post-construction Outstanding certifications, a 90-point WELL Building Standard Comfort Score, and Platinum-level WiredScore and SmartScore certifications.

In addition to its successful project portfolio, Planon has strengthened its software capabilities and integration ecosystem over the past 2 years through strategic acquisitions and partnerships. A key milestone includes the jointly produced solution with SAP, which has received SAP Endorsed Apps certification, reflecting its seamless integration with SAP's enterprise solutions. This marks the only solution in the market that fully bridges real estate/facility management with finance and ERP systems, offering single sign-on, shared master data, and deep application-layer integration.

Over the next 2 years, Planon anticipates a significant shift in customer requirements, driven by advancements in mobile solutions, ESG integration, AI, hybrid workplace models, and open platforms. To stay ahead, the company is investing heavily in research and development, open-platform innovation, strategic mergers and acquisitions, and global market expansion, ensuring it continues to deliver cutting-edge solutions that meet evolving market needs. Through endorsed partnerships with SAP and Schneider Electric, Planon is unlocking new opportunities in the corporate real estate and mid-market sectors,

bridging the gap between operational technology and enterprise IT systems. As part of its long-term innovation strategy, Planon is expanding data integration to enhance connectivity with ERP systems, industry benchmarks, and sustainability reporting frameworks, improving decision-making and compliance. Furthermore, the company is leveraging AI and machine learning to advance predictive analytics and automation, optimizing energy efficiency, maintenance planning, and space utilization. To reinforce sustainable building practices, Planon is also expanding its Whole Life Carbon & Circularity Insights globally, enabling organizations to assess embodied carbon and circularity potential and driving long-term environmental and operational impact.

Frost & Sullivan recognizes Planon's strong position in the rapidly expanding IoT-driven building energy management industry, which is expected to be the fastest-growing segment in the property technology space. With a strategic presence in key geographic regions driving this growth, Planon is well-positioned to capitalize on emerging growth opportunities by leveraging its cutting-edge solutions, open-platform strategy, and deep industry expertise. The company's commitment to innovation, seamless integration with enterprise systems, and sustainability-driven advancements ensures it remains at the forefront of digital transformation in real estate and facility management, reinforcing its future growth potential and long-term market impact.

Conclusion

Frost & Sullivan's ongoing research confirms that Planon's unwavering commitment to innovation, customer-centricity, and sustainability has solidified its position as a global leader in the IoT-driven building energy management industry. By leveraging an open, interoperable platform, the company empowers organizations to seamlessly integrate energy management, real estate operations, and sustainability initiatives into a unified, data-driven ecosystem. With its strong financial performance, strategic partnerships, and continuous advancements in AI, IoT, and ESG compliance, Planon remains at the forefront of the rapidly evolving smart building industry.

As businesses face increasing pressure to optimize energy efficiency, reduce carbon footprint, and enhance operational resilience, the company's scalable and future-ready solutions provide a pathway to long-term success. Backed by Frost & Sullivan's recognition, Planon is well-positioned to drive the next wave of digital transformation in real estate and facility management, ensuring organizations remain competitive, sustainable, and adaptable in an ever-changing global landscape.

With its strong overall performance, Planon earns the 2025 Frost & Sullivan Global Customer Value Leadership Recognition in the IoT-driven building energy management industry.

What You Need to Know about the Customer Value Leadership Recognition

Frost & Sullivan's Customer Value Leadership Recognition is its top honor and recognizes the market participant that exemplifies visionary innovation, market-leading performance, and unmatched customer care.

Best Practices Recognition Analysis

For the Customer Value Leadership Recognition, Frost & Sullivan analysts independently evaluated the criteria listed below.

Business Impact

Financial Performance: Strong overall business performance is achieved in terms of revenue, revenue growth, operating margin, and other key financial metrics

Customer Acquisition: Customer-facing processes support efficient and consistent new customer acquisition while enhancing customer retention

Operational Efficiency: Company staff performs assigned tasks productively, quickly, and to a high-quality standard

Growth Potential: Growth is fostered by a strong customer focus that strengthens the brand and reinforces customer loyalty

Human Capital: Leveraging innovative technology characterizes the company culture, which enhances employee morale and retention

Customer Impact

Price/Performance Value: Products or services offer the best ROI and superior value compared to similar market offerings

Customer Purchase Experience: Purchase experience with minimal friction and high transparency assures customers that they are buying the optimal solution to address both their needs and constraints

Customer Ownership Excellence: Products and solutions evolve continuously in sync with the customers' own growth journeys, engendering pride of ownership and enhanced customer experience

Customer Service Experience: Customer service is readily accessible and stress-free, and delivered with high quality, high availability, and fast response time

Brand Equity: Customers perceive the brand positively and exhibit high brand loyalty, which is regularly measured and confirmed through a high Net Promoter Score®

Best Practices Recognition Analytics Methodology

Inspire the World to Support True Leaders

This long-term process spans 12 months, beginning with the prioritization of the sector. It involves a rigorous approach that includes comprehensive scanning and analytics to identify key best practice trends. A dedicated team of analysts, advisors, coaches, and experts collaborates closely, ensuring thorough review and input. The goal is to maximize the company’s long-term value by leveraging unique perspectives to support each Best Practice Recognition and identify meaningful transformation and impact.

STEP		VALUE IMPACT	
		WHAT	WHY
1	Opportunity Universe	Identify Sectors with the Greatest Impact on the Global Economy	Value to Economic Development
2	Transformational Model	Analyze Strategic Imperatives That Drive Transformation	Understand and Create a Winning Strategy
3	Ecosystem	Map Critical Value Chains	Comprehensive Community that Shapes the Sector
4	Growth Generator	Data Foundation That Provides Decision Support System	Spark Opportunities and Accelerate Decision-making
5	Growth Opportunities	Identify Opportunities Generated by Companies	Drive the Transformation of the Industry
6	Frost Radar	Benchmark Companies on Future Growth Potential	Identify Most Powerful Companies to Action
7	Best Practices	Identify Companies Achieving Best Practices in All Critical Perspectives	Inspire the World
8	Companies to Action	Tell Your Story to the World (BICEP*)	Ecosystem Community Supporting Future Success

*Board of Directors, Investors, Customers, Employees, Partners

About Frost & Sullivan

Frost & Sullivan is the Growth Pipeline Company™. We power our clients to a future shaped by growth. Our Growth Pipeline as a Service™ provides the CEO and the CEO's growth team with a continuous and rigorous platform of growth opportunities, ensuring long-term success. To achieve positive outcomes, our team leverages over 60 years of experience, coaching organizations of all types and sizes across 6 continents with our proven best practices. To power your Growth Pipeline future, visit Frost & Sullivan at <http://www.frost.com>.

The Growth Pipeline Generator™

Frost & Sullivan’s proprietary model to systematically create ongoing growth opportunities and strategies for our clients is fuelled by the Innovation Generator™.

[Learn more.](#)

Key Impacts:

- **Growth Pipeline:** Continuous Flow of Growth Opportunities
- **Growth Strategies:** Proven Best Practices
- **Innovation Culture:** Optimized Customer Experience
- **ROI & Margin:** Implementation Excellence
- **Transformational Growth:** Industry Leadership



The Innovation Generator™

Our 6 analytical perspectives are crucial in capturing the broadest range of innovative growth opportunities, most of which occur at the points of these perspectives.

Analytical Perspectives:

- **Megatrend (MT)**
- **Business Model (BM)**
- **Technology (TE)**
- **Industries (IN)**
- **Customer (CU)**
- **Geographies (GE)**

