



65th ARGE ANNUAL
CONFERENCE
14th – 15th September 2017
Salzburg, Austria

Digital Transformation Effecting our Industry

Dr. Andreas Häberli, CTO dormakaba Group

CHANGE²

A FILM BY GERD LEONHARD

Something is happening!

Uber

The largest taxi enterprise owns no cars.



\$70b

Facebook

The most popular media house creates no contents.



\$390b

Alibaba

The largest retail company has no stocks.



\$257b

Airbnb

The largest accommodation provider owns no real estate.



\$25b



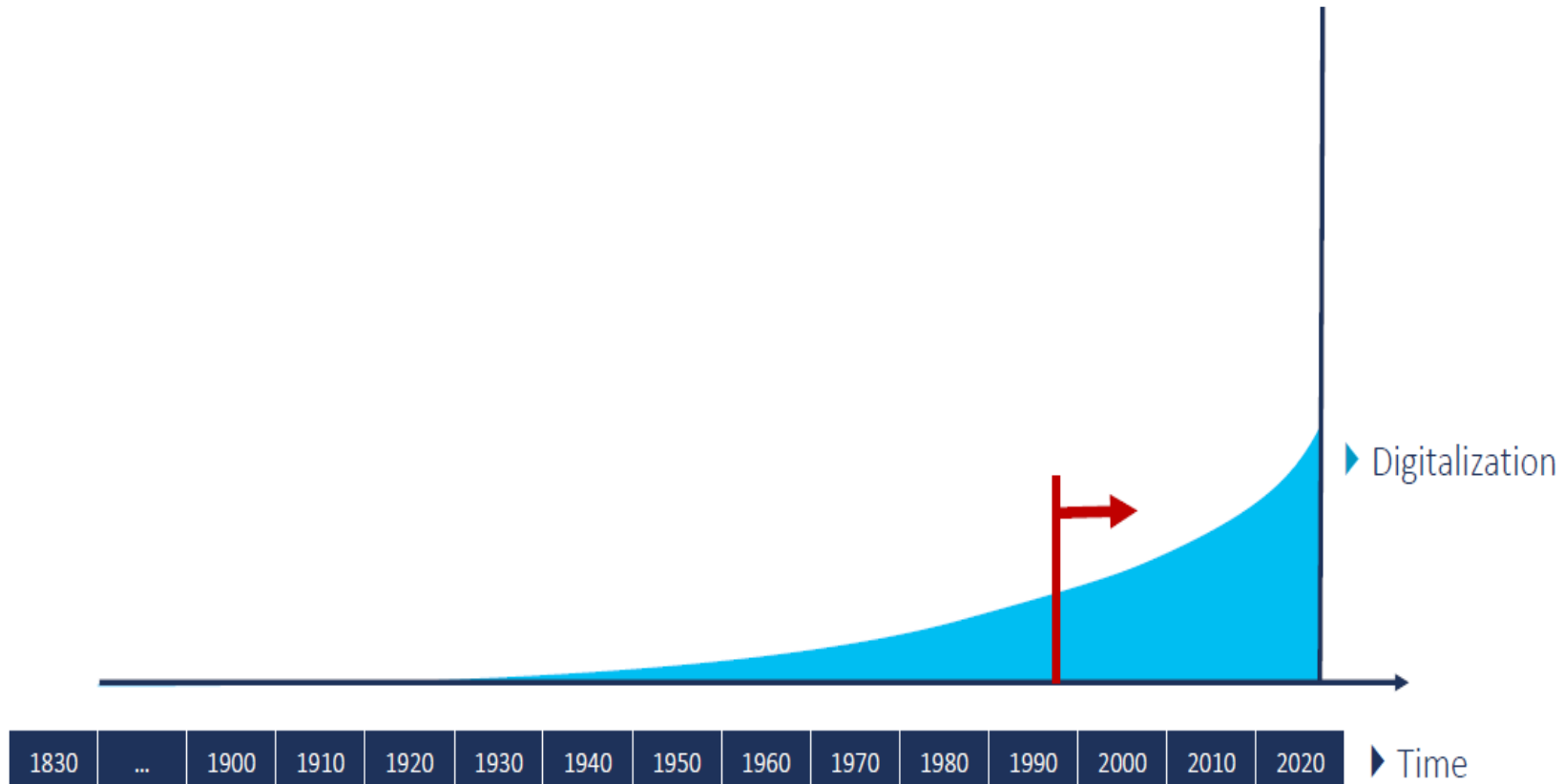
valuation

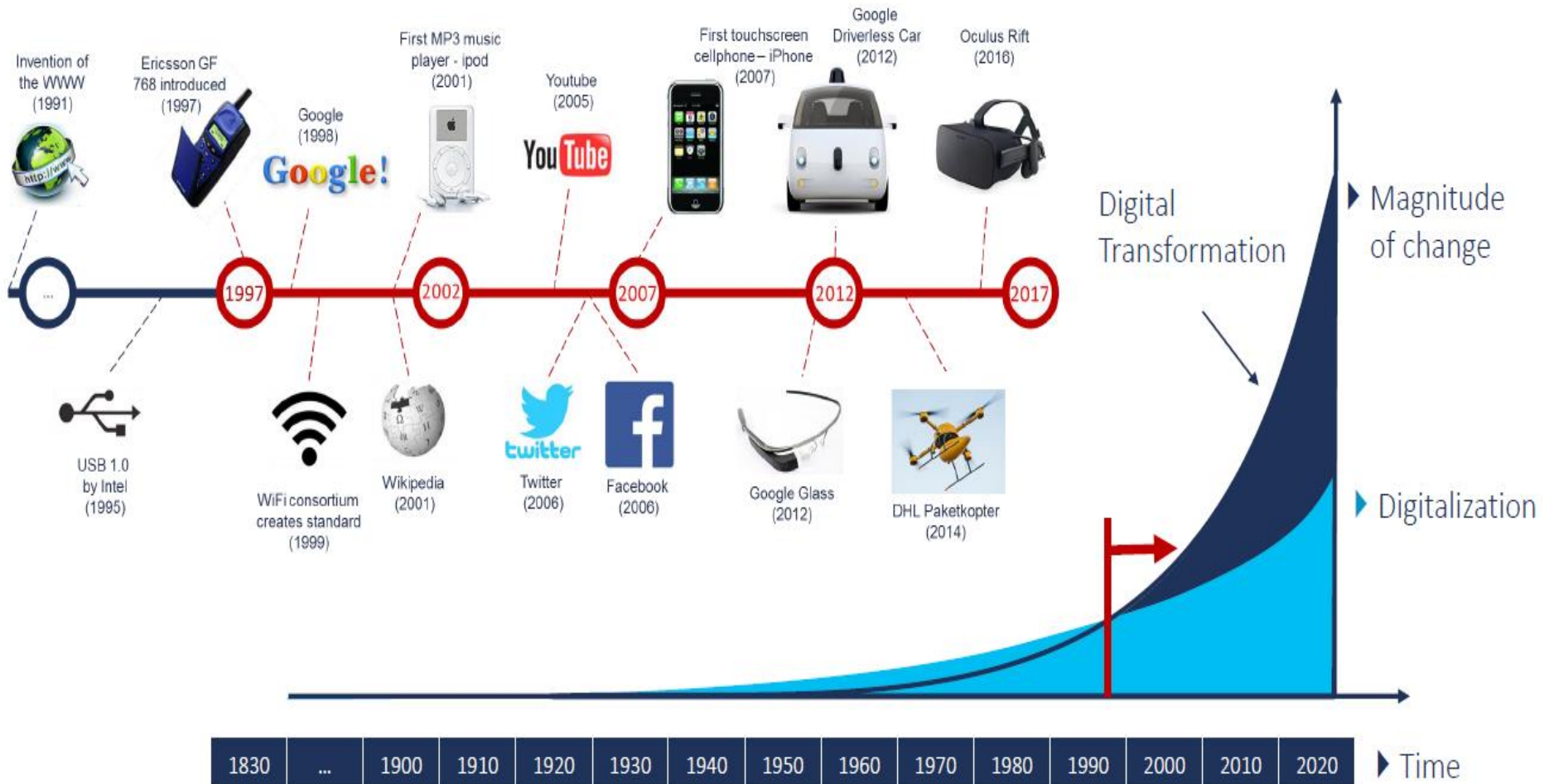
Agenda

The digital transformation of industry

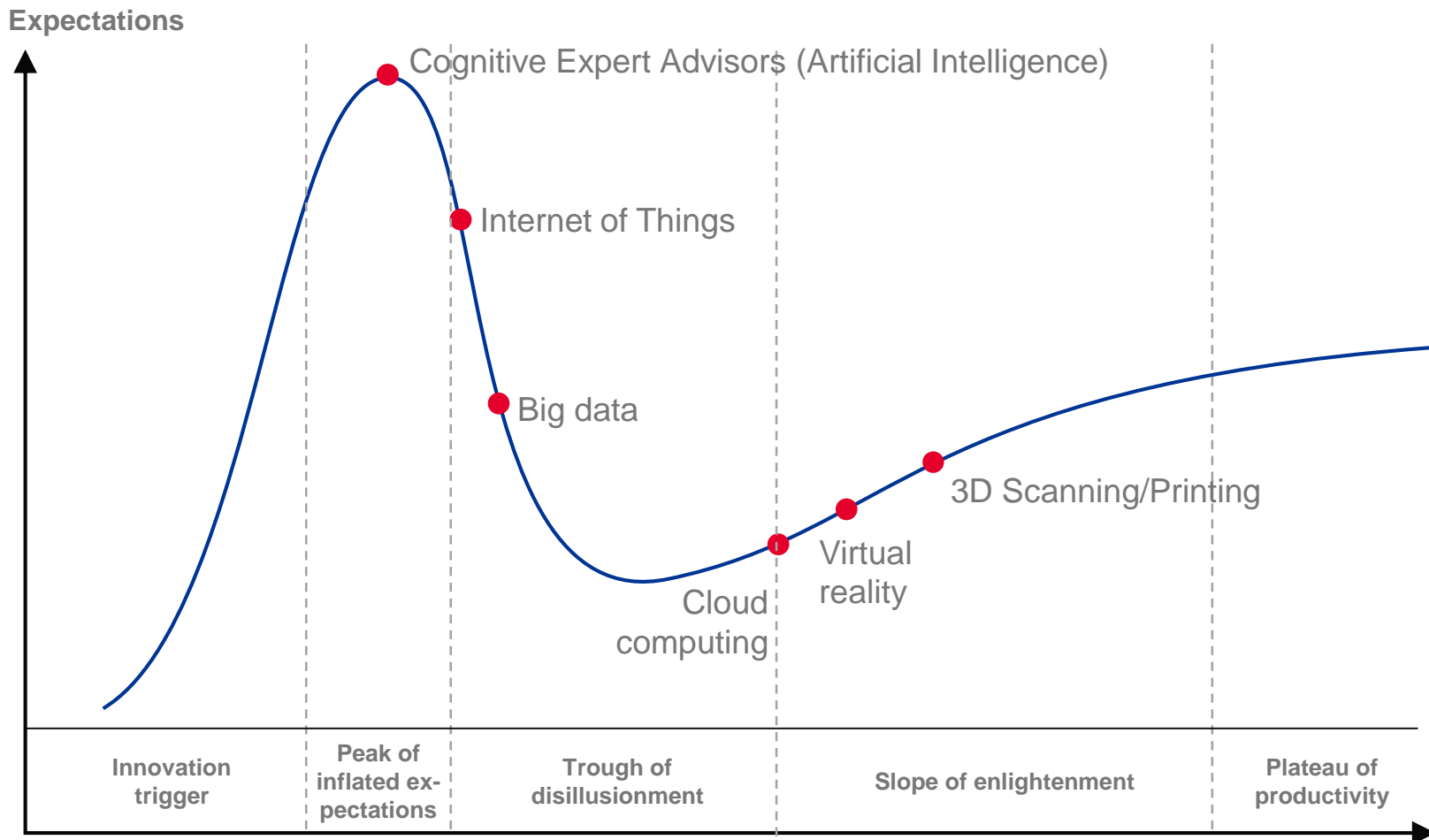
Opportunities

Conclusions

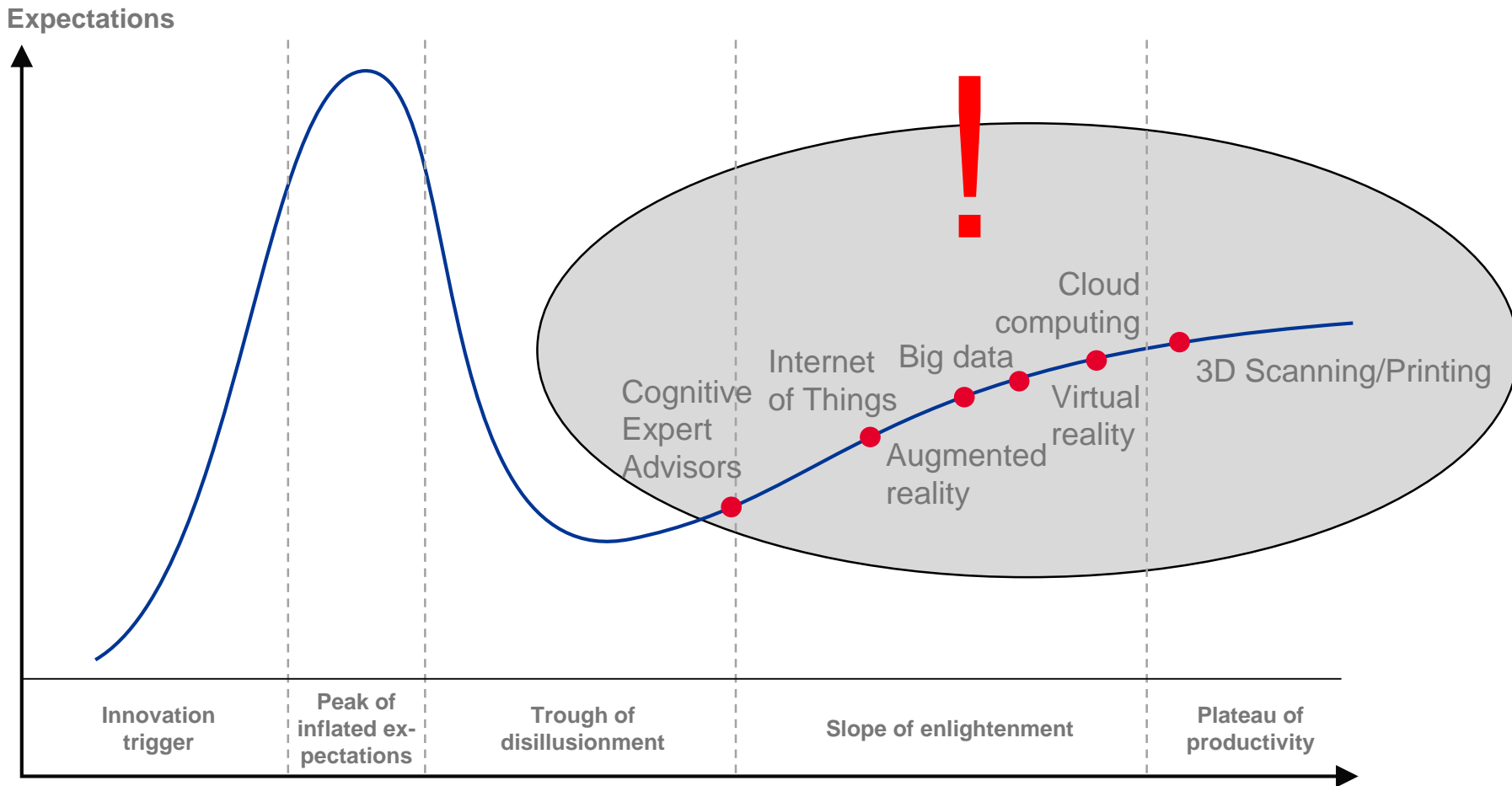








Technology hype cycle in 2016



Technology hype cycle in 2020



The 4th Industrial Revolution

Revolution	Year	Lever	
	1	1784	Steam, water, mechanical production equipment
	2	1870	Division of labour, electricity, mass production
	3	1969	Electronics, IT, automated production
	4	?	Cyber-physical systems also known as the “Digital Twin”

The Digital Transformation is about

TECHNOLOGY


The 4th Industrial Revolution



«We are at the beginning of a technical revolution which will change the way we live and work fundamentally. By its impact, range and complexity this transformation cannot be compared with anything mankind has experienced before.»

Microsoft CEO: Satya Nadella

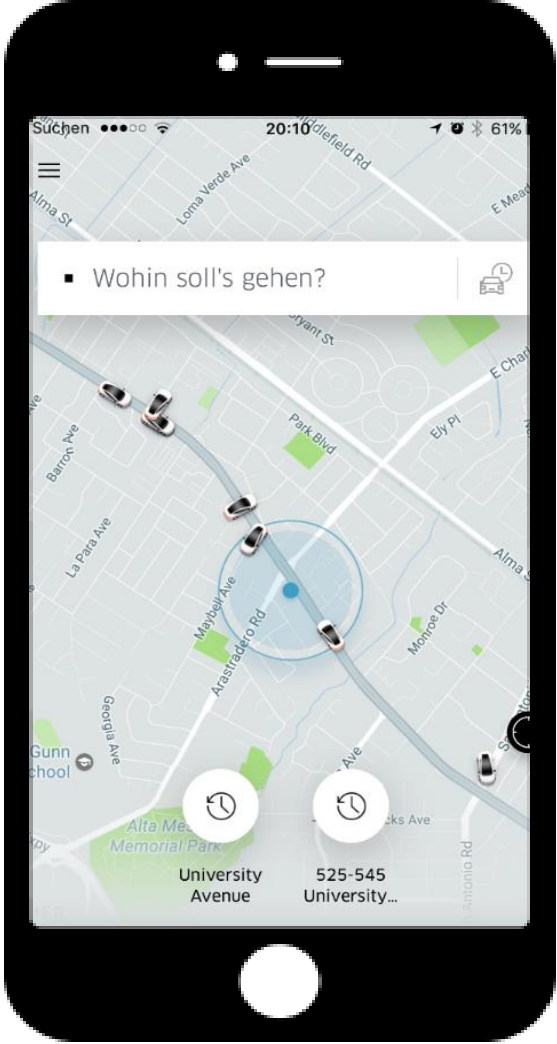


A photograph of Satya Nadella, CEO of Microsoft, speaking at a podium. He is wearing a dark suit, a white shirt, and a dark tie. He has glasses and is looking slightly to the right of the camera. The background is a blue wall with a faint world map. The text is overlaid on the image in white.

“The gross margin of a thing is growing to the value of the services it can provide.”

Nadella, CEO Microsoft

The Digitalization of Mobility



The Digitalization of Mobility



The Digitalization of Mobility

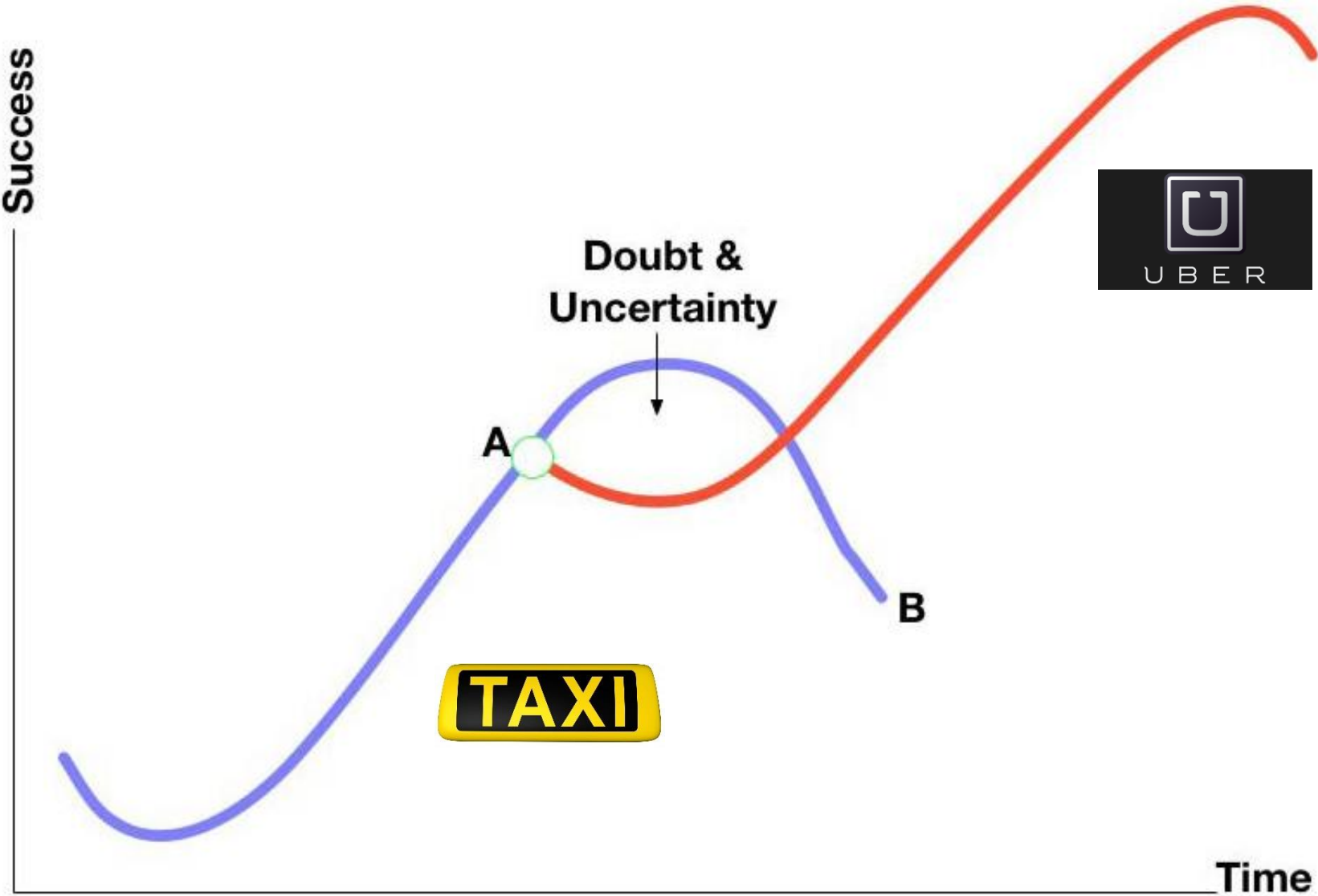


The Digitalization of Mobility





The second curve...

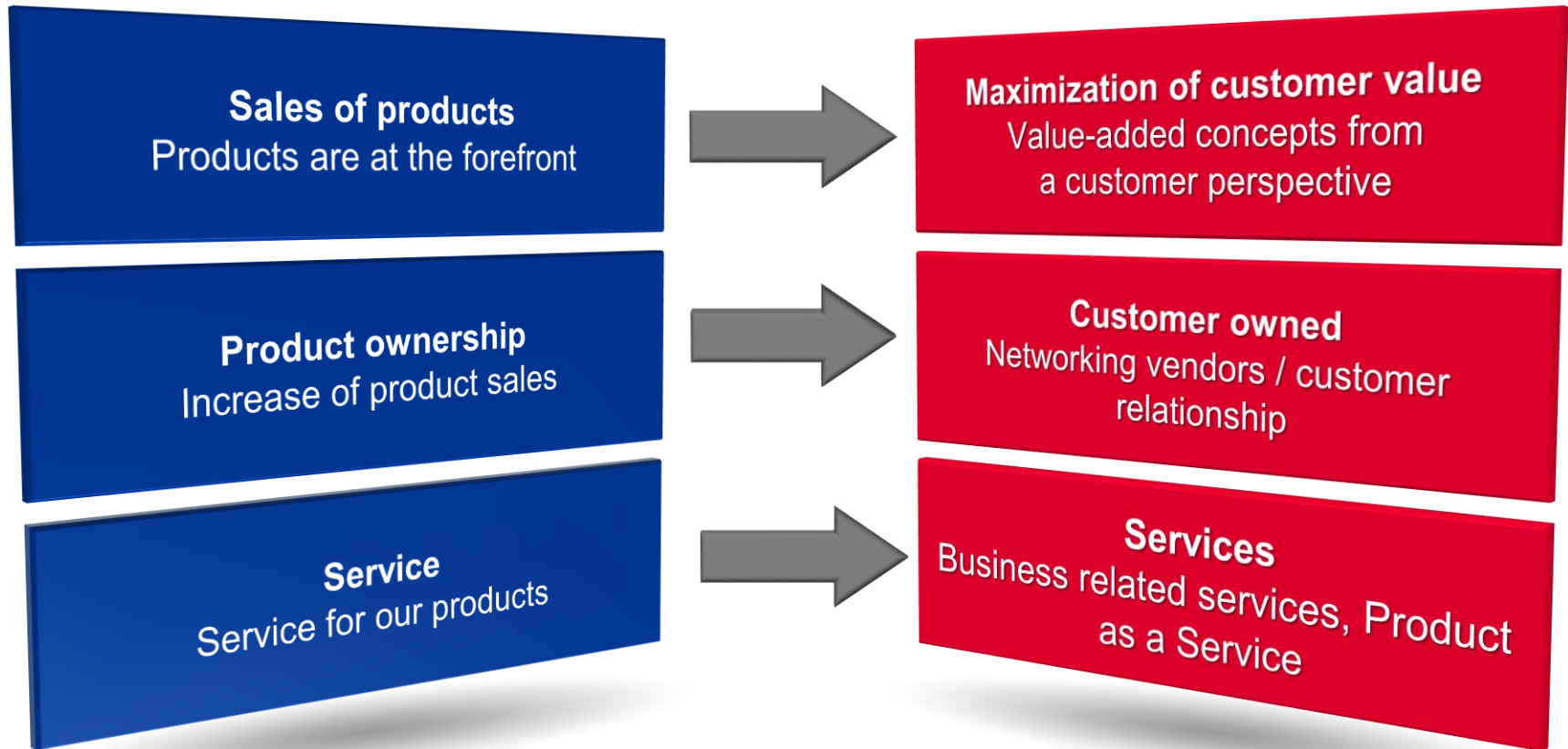


Digital economy awaits new business models

Product orientation

Market Dynamics in
the Digital Economy

Customer orientation



The Digital Transformation is about

TECHNOLOGY
BUSINESS MODELS

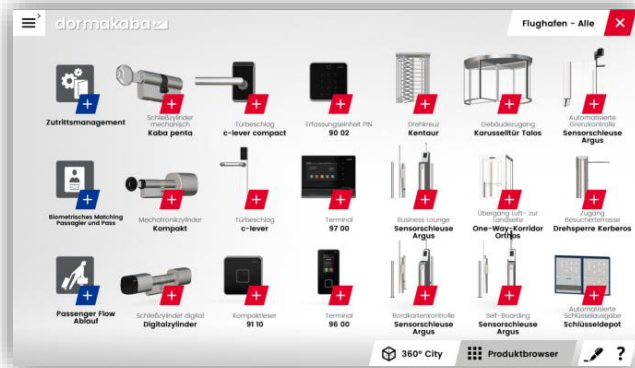
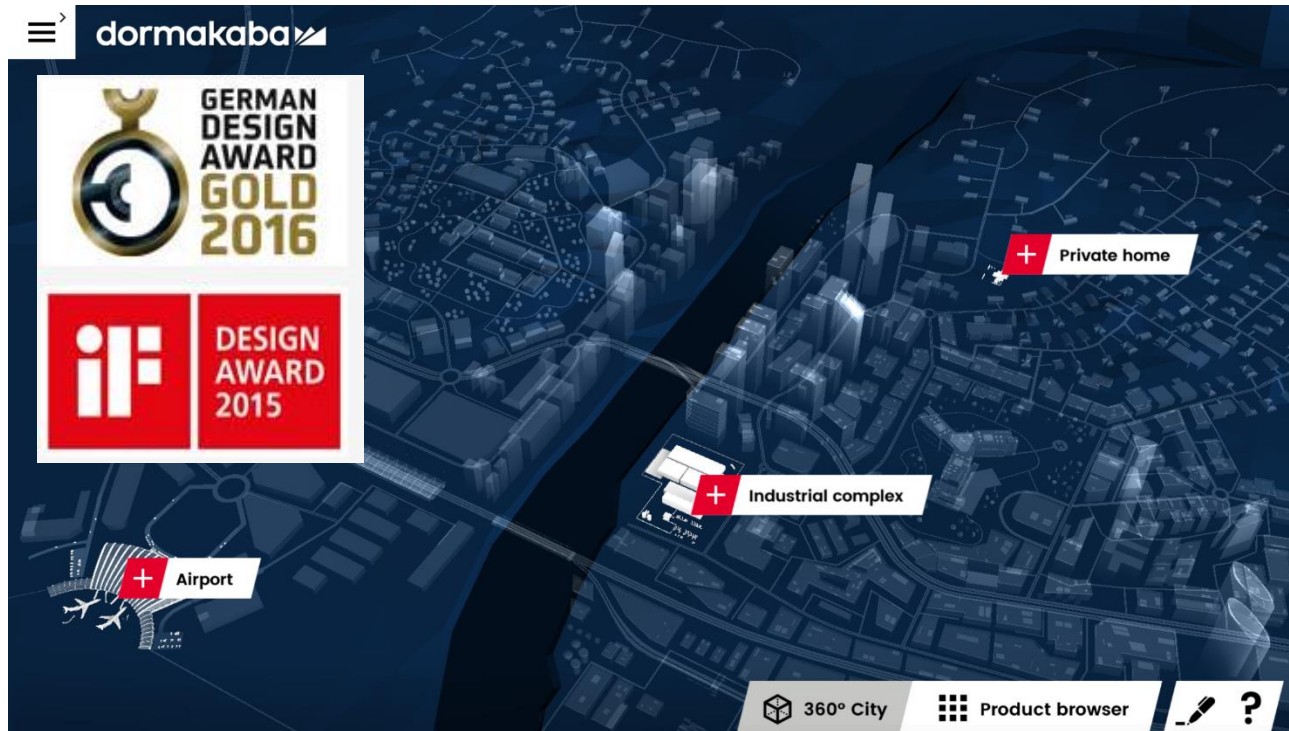
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The digital transformation of industry

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Engage with customers in new ways!



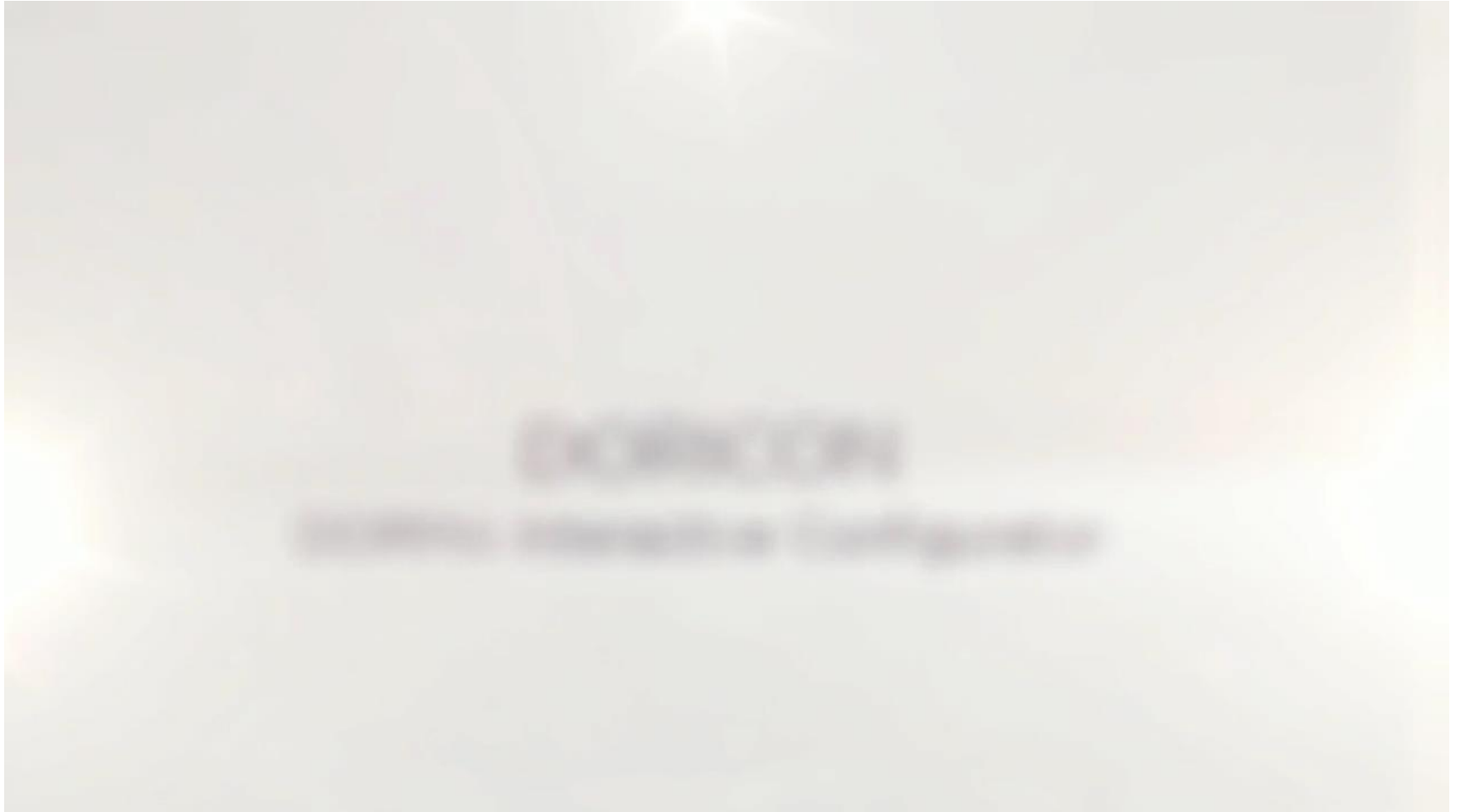
The offering is more than the sum of our products!



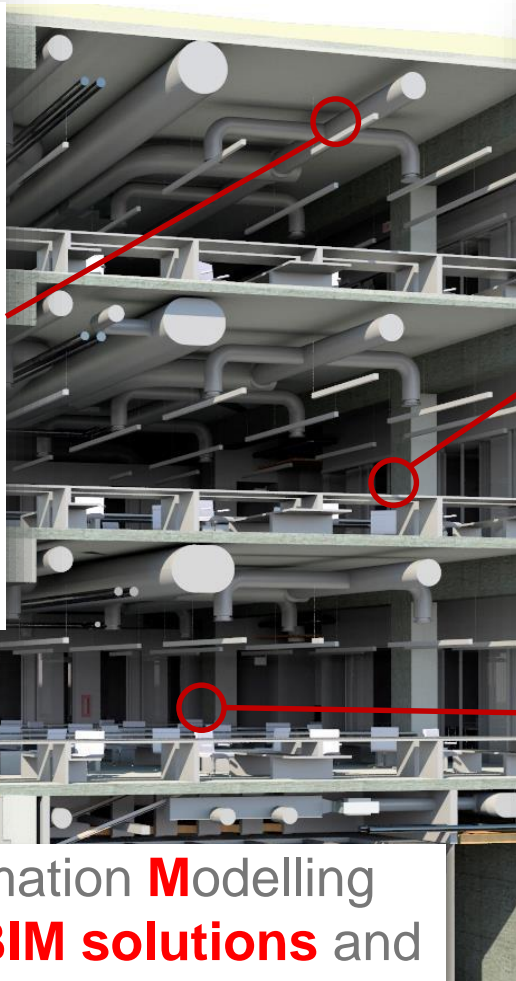
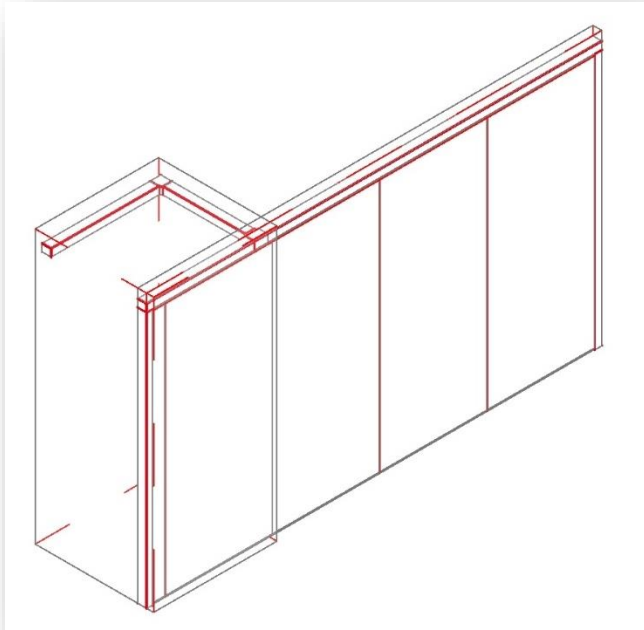
Virtual Reality!



Individualize!



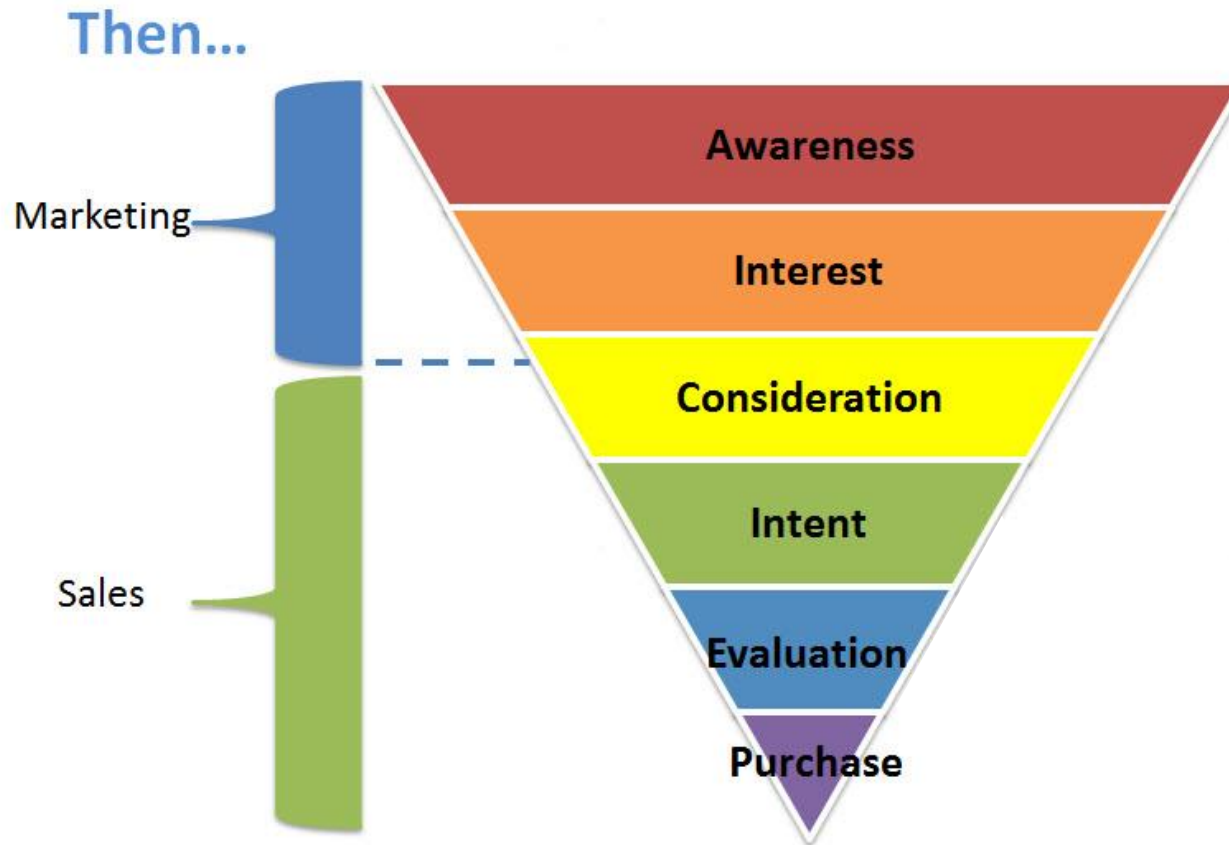
First build digital, then real!



Support the **B**uilding **I**nformation **M**odelling process by **BIM objects**, **BIM solutions** and **BIM tools**.

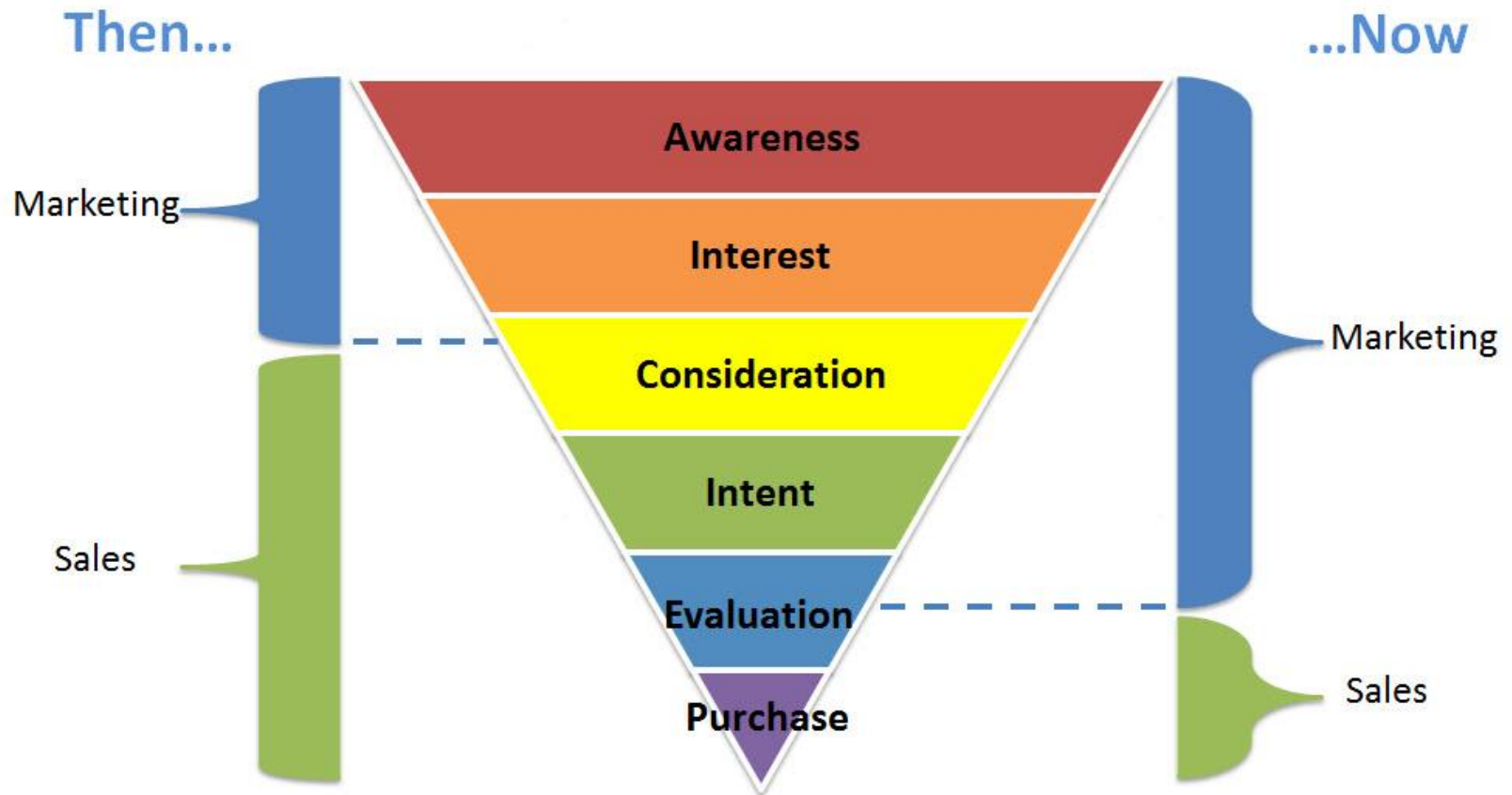
But wait a moment! What is happening?

The New Marketing & Sales Funnel



But wait a moment! What is happening?

The New Marketing & Sales Funnel

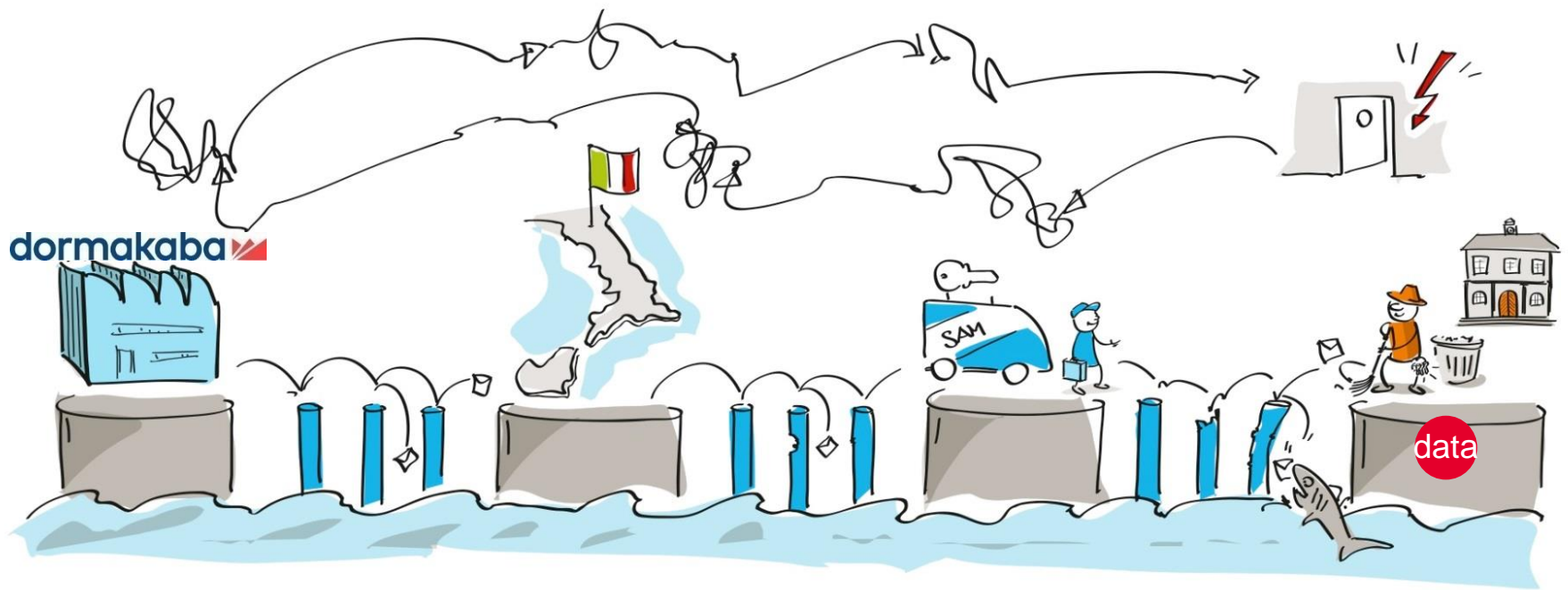


Opportunities I/II

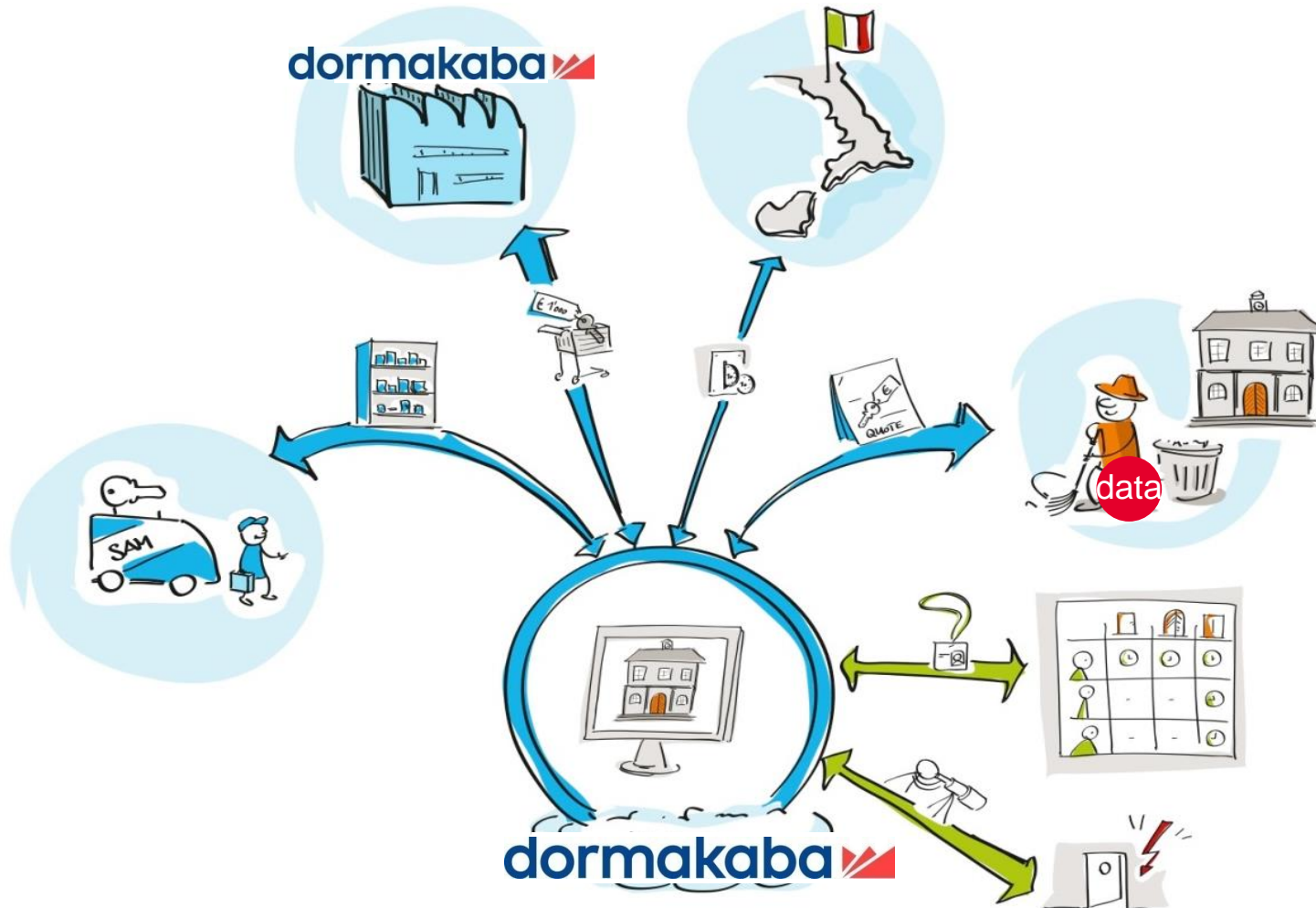
- engage with our customer in new ways (example: virtual reality)
- individualize the offering (example: configurators, planning tools)
- first build digital, then real (example: BIM)
- widen the marketing and sales funnel!

We want to be part of a seamless customer journey!

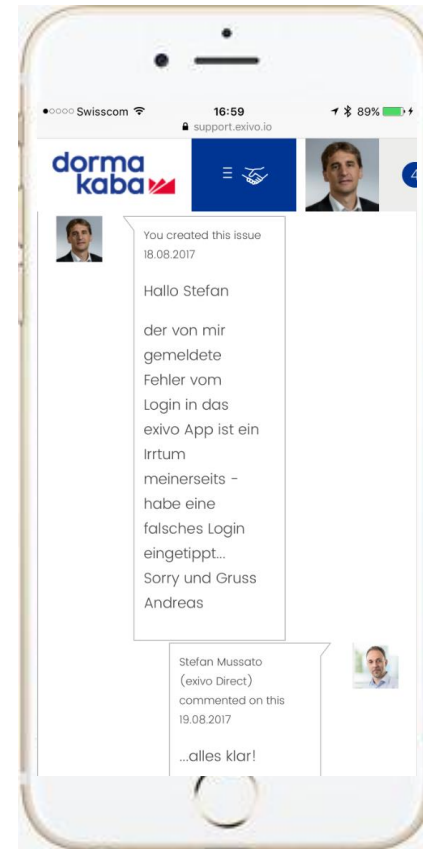
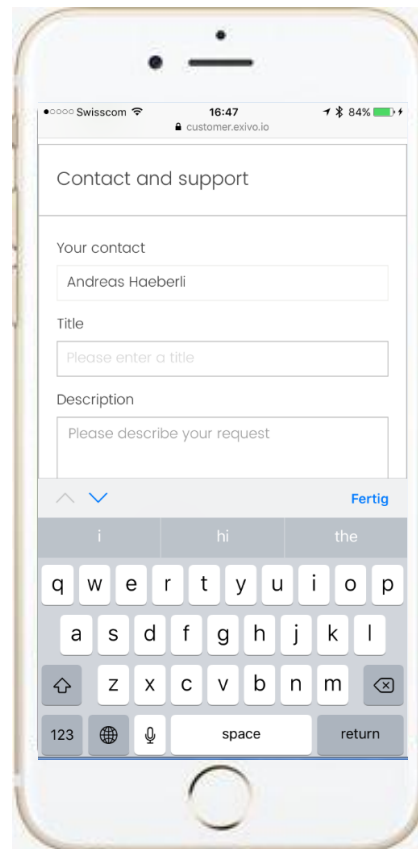
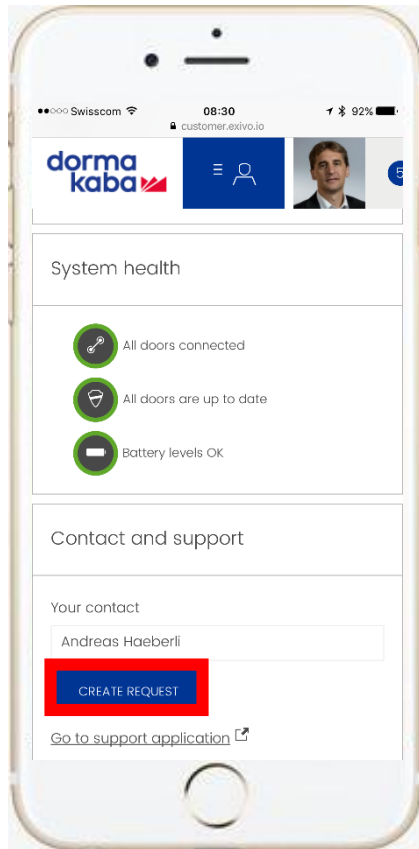
We change today's customer experience chain...



... from isolated touchpoints to a seamless journey!



To create a seamless customer experience!



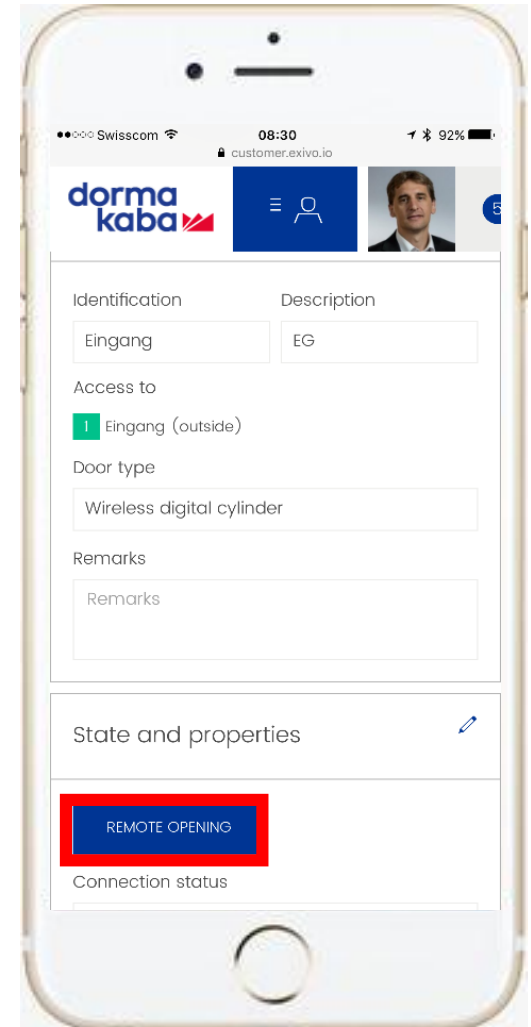
With on demand services! Anytime, anywhere...



Can you quickly send me a key?

Pleaaaase..., need to go to the bathroom...

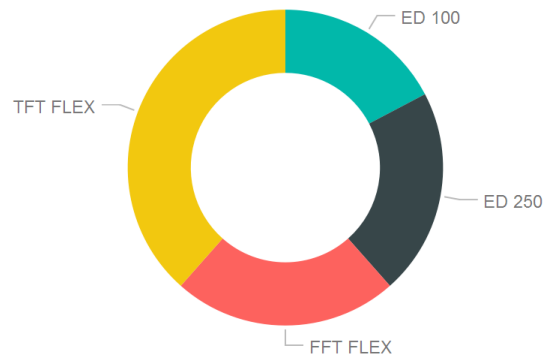
Papa??



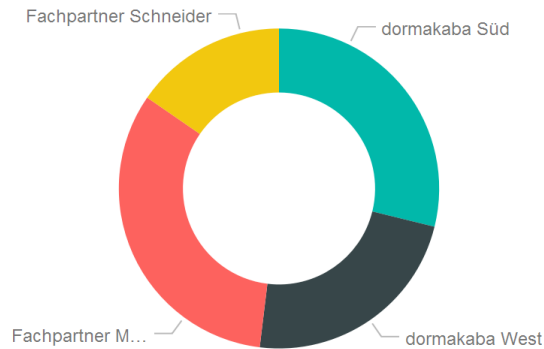
To collect information for...

Where are the doors?
Who did the installation/service?

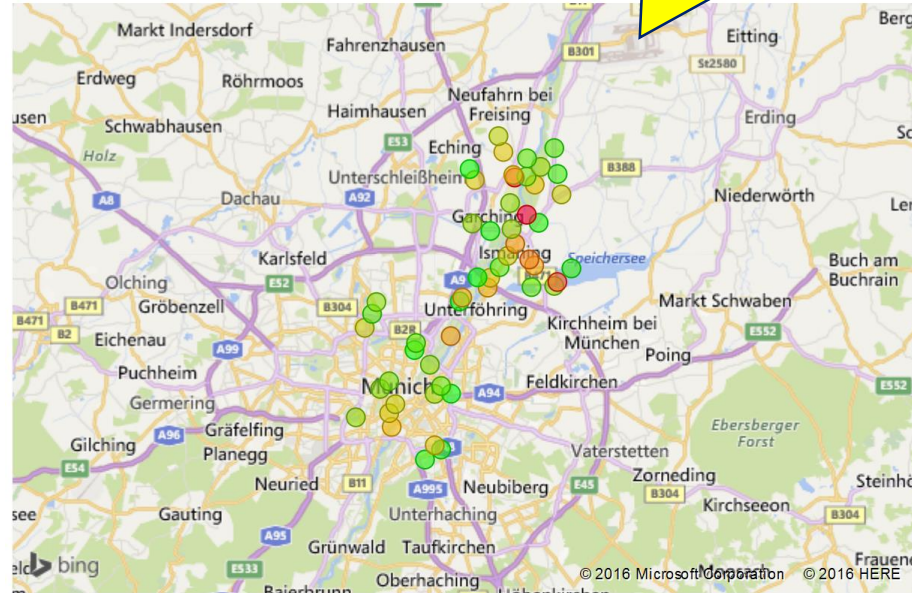
Share by Type of Operator



Share by Customer



Counter estimation



- ◇ Partner
- (Blank)
- dormakaba Süd
- dormakaba West
- Fachpartner Müller
- Fachpartner Schneider

- ◇ Customer
- (Blank)
- Eigenmann
- Haldemann
- Herbert
- Herzog
- Ludwig
- Maier
- Meier
- Müller
- Notter
- Reinhoff
- Schmid
- Schneider
- Segmeister
- van Nistrop
- Wenger
- Wirz
- Wolf
- Wullschlegler

Anzahl BLE angeschlossene Operatoren

52

Count of BLE UID

Total number of open/close

21M

Counter cum

Anzahl Kunden

19

Count of Customer

Average Counter Status

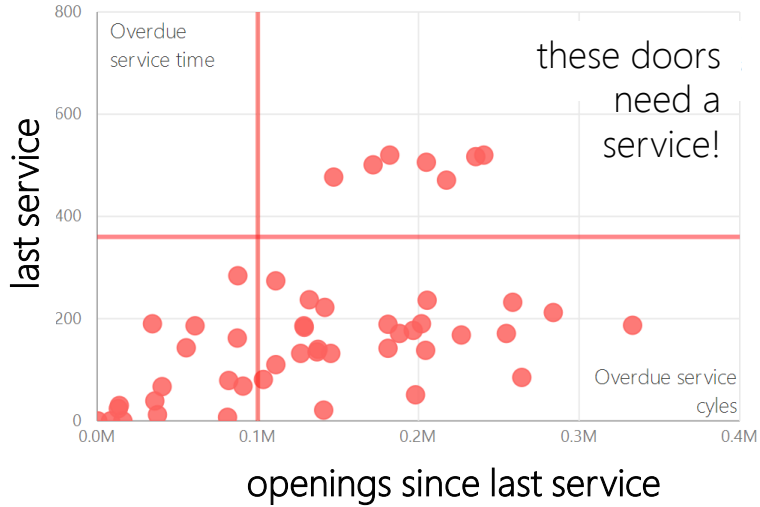
400K

Average of Counter cum

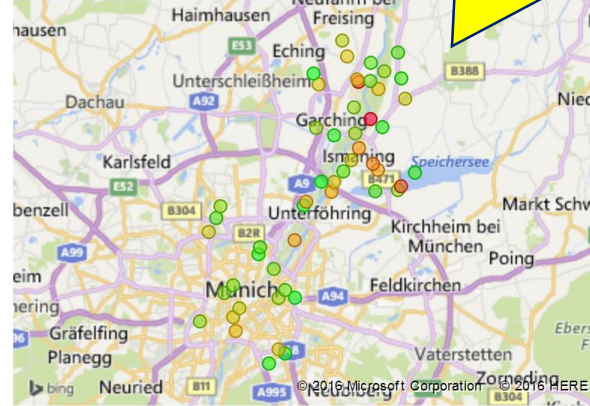
....predictive services.

Which door needs a service?

Counter estimation and Last Maintenance by BLE UID



Counter estimation



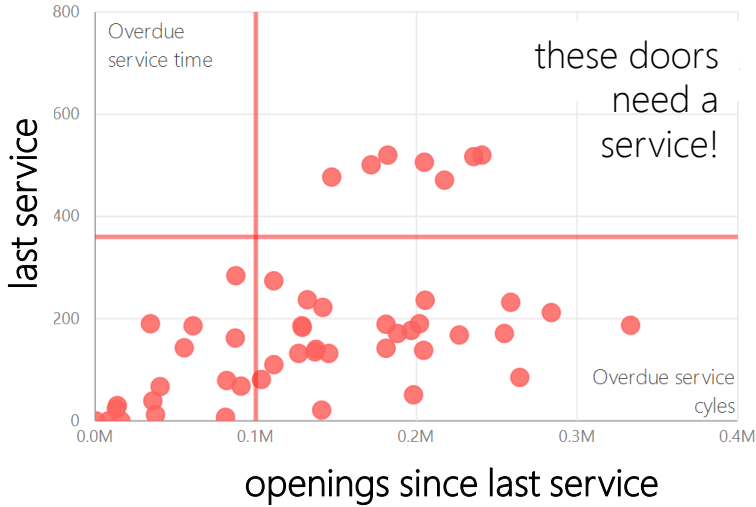
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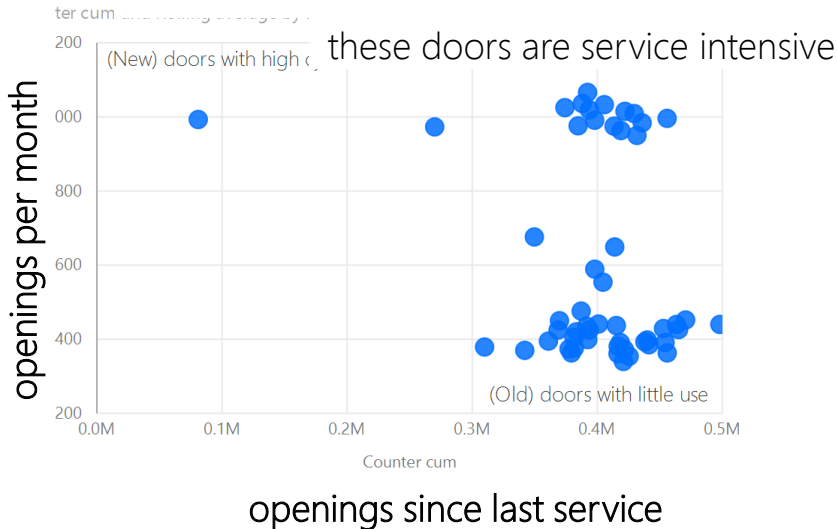
....predictive services...

Which door needs a service?

Counter estimation and Last Maintenance by BLE UID



Counter estimation

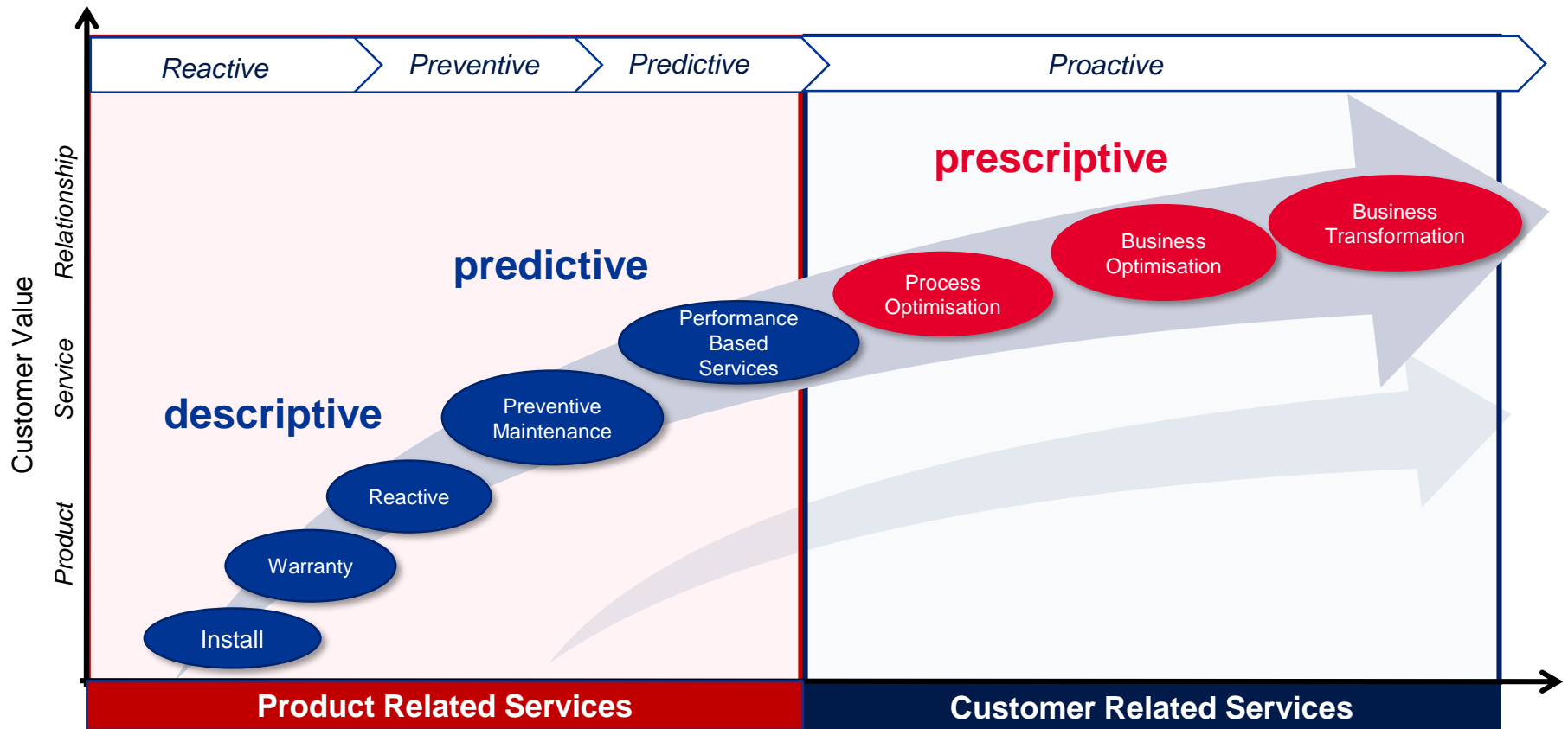


How often does a door need a service?

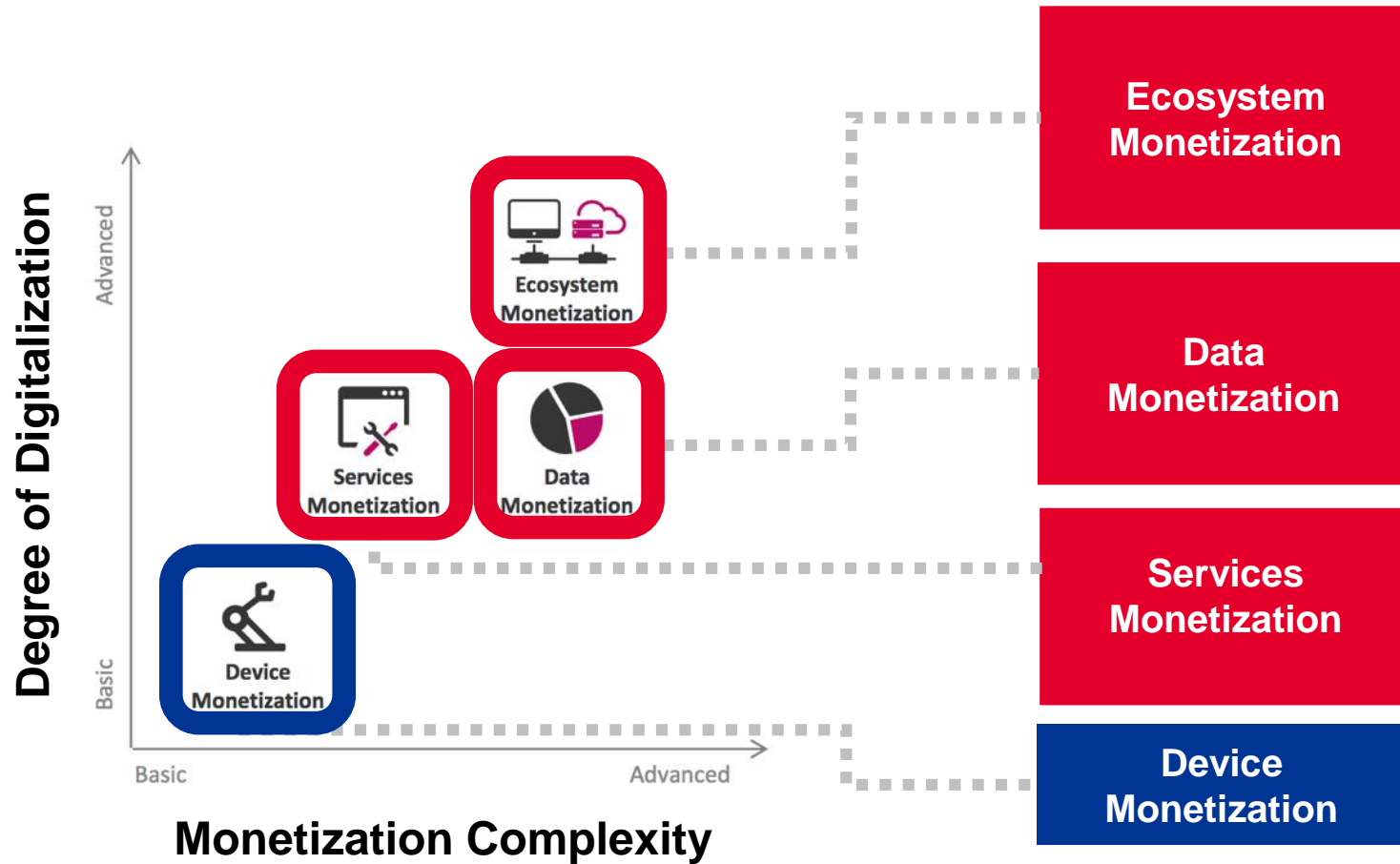
Counter estimation



Connectivity allows the **power of analytics** to drive **new Services offerings**



....to realize additional monetization opportunities!



Operational Excellence of Digital Services



 digital services

 operation
quality

Opportunities - Summary

- engage with our customer in new ways (example: virtual reality)
- individualize the offering (example: configurators, planning tools)
- first build digital, then real (example: BIM)
- widen the marketing and sales funnel!
- become part of a customer's life (example: mobile credentials)!
- offer on-demand services (example: Access Control as a Service)
- realize new monetarization opportunities (example: predictive services)

Agenda

The digital transformation of industry

Opportunities

Conclusions

The Digital Transformation is about

TECHNOLOGY

Those who live by the sword...
will be shot by those who don't.



The Digital Transformation is about:

TECHNOLOGY
BUSINESS MODELS

Digital Transformation



The Digital Transformation is about:

TECHNOLOGY

BUSINESS MODELS

CULTURE

