



Yankee Group Anywhere Scorecard Guide

Understanding Anywhere Scorecards

What are Anywhere Scorecards?

Yankee Group Anywhere Scorecards rank products and services in markets impacted by ubiquitous connectivity. Anywhere Scorecards are developed using an objective, data-driven methodology, and evaluate vendors based on detailed criteria relating to Vision and Ability to Transform. The Anywhere Scorecard graphic provides a visual ranking of vendor results.

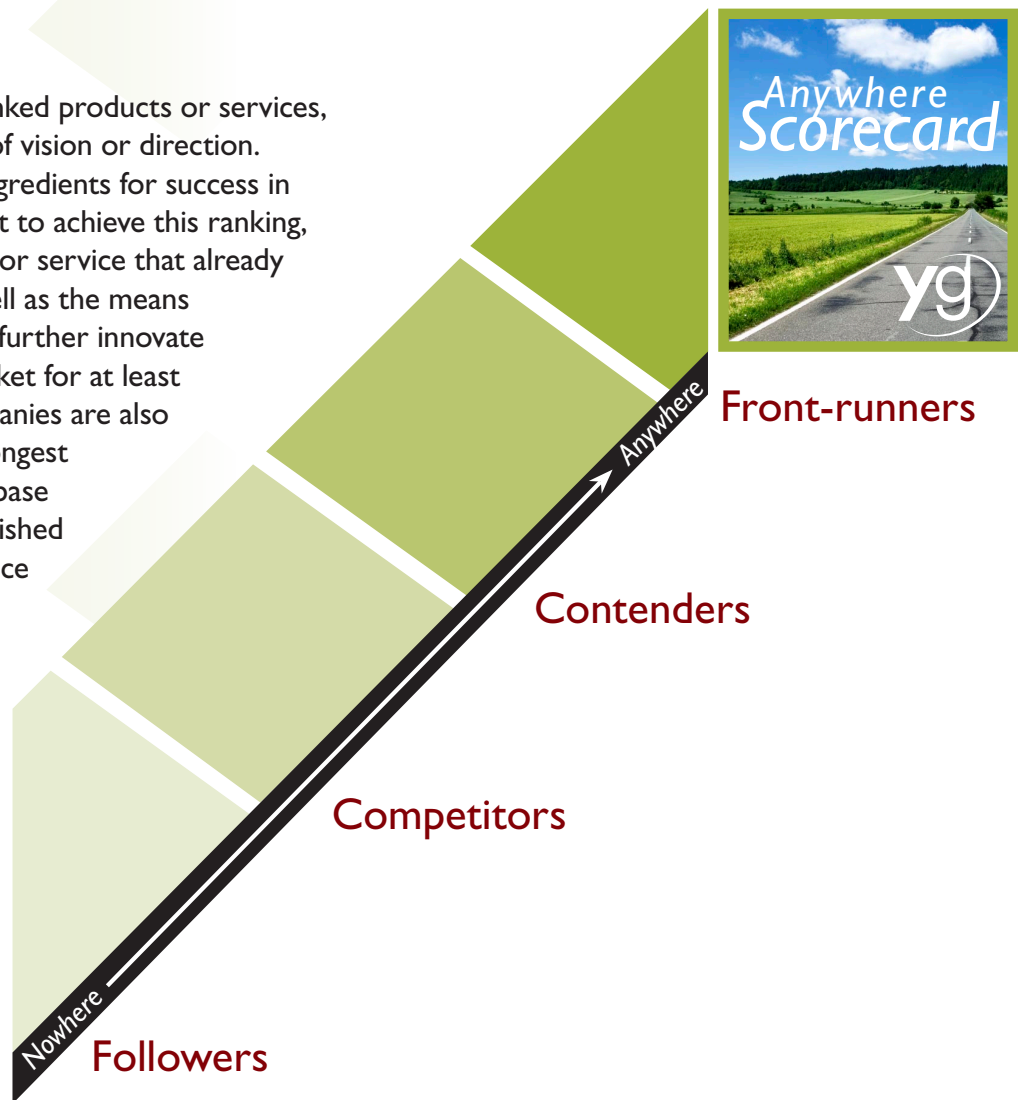
Using Anywhere Scorecards

Organizations may leverage Anywhere Scorecards as an independent research tool to evaluate products and services. Vendors may use Anywhere Scorecards to assess competition or highlight their positioning relative to the Anywhere vision.

Defining the vendor rankings

Front-runners: The highest-ranked products or services, with an exemplary combination of vision or direction.

These companies have the key ingredients for success in the marketplace. For a participant to achieve this ranking, they must have a strong product or service that already resonates with the market, as well as the means (both intellectual and tangible) to further innovate and remain at the top of the market for at least the next 12 months. These companies are also typically the players with the strongest reputation among the customer base and have some measure of established track record for product or service excellence in the market.



Contenders: The second-best designation, with good vision and good execution. Often, players earn this designation because of overwhelming strength in either Vision or Ability to Transform, but slight deficiencies in the other. For example, a new entry with a visionary approach and strong product or service features, but a lack of financial wherewithal, R&D capabilities or existing account references to appeal to all potential customers, would likely be labeled a Contender. These players are primed to move up to Front-runner status in subsequent versions of the Scorecard, provided they evolve in the proper fashion.

Competitors: Limited, but still noteworthy vision and execution. These players have a story to tell, but have some ground to make up in at least a couple of respects. The most common participant to fall in this category would be a niche player. For example, the product or service has some particularly strong features, but is not a comprehensive solution. The player could have a solution that is particularly strong for a certain type of customer, but cannot be recommended across the board. Yankee Group may recommend these participants in very specific circumstances, depending on customer requirements.

Followers: Vision and ability to deliver on core category elements are lacking. A player in this category is still notable in the market as a whole, otherwise it would not have been selected for inclusion in the Anywhere Scorecard. But Yankee Group's analysis has uncovered significant flaws with either the product or service or the player's underlying operating model. These flaws make it difficult to envision the participant succeeding in the long term, and could make it a candidate for replacement on subsequent Anywhere Scorecards in favor of more compelling offerings that may emerge. Users would rarely be wise to choose a product or service with this final score, absent specific circumstances that would dictate otherwise.



Selecting scorecard topics

Yankee Group evaluates product or service categories that are

- Impacted by ubiquitous connectivity
- Where customer education is needed
- Areas of high customer interest and transformation.

Current and planned Anywhere Scorecard topics include content delivery networks, virtual desktop and application virtualization, Carrier Ethernet transport, service delivery platforms and mobile operating systems. Scorecards are updated on an annual basis.

Choosing the participants

Yankee Group selects the five to 10 key players in a given market. The list is also vetted with existing and potential customers to make sure that the most relevant players are scored. Participants are confined to those players that develop the product or service in question internally, rather than those that may resell, white label or license a solution.

Understanding the research process

The Anywhere Scorecard relies heavily on primary research. To compile the primary data, Yankee Group fields an extensive questionnaire to all the players included in the scorecard that covers a wide range of issues, from pricing to services to architecture to customers to future strategy. To follow up on the questionnaire, Yankee Group conducts primary interviews with vendors to discuss broader market trends and competitive positioning.

Yankee Group analysts augment this information with publicly available data such as financial filings, customer references and public statements. In addition, Yankee Group leverages its own qualitative and quantitative research and data from surveys and global market monitors and forecasts.

This primary research is supported by ongoing conversations with existing and prospective customers of the products and services. These conversations inform not only the scoring of the individual players, but also the structure of the Anywhere Scorecard and decisions around what elements to include in the scoring. These conversations occur year-round and, combined with discussions with investors in the market, potential partners and tangential market players, culminate in the findings of the scorecard.

Evaluating vendors

The Anywhere Scorecard features two evaluation categories: **Vision** and **Ability to Transform**.

Vision: Examines the core assets and strategic direction of players, measured against its alignment with Yankee Group's concept of Anywhere. Anywhere is our understanding of how the emergence of ubiquitous connectivity will transform consumers, enterprises and the world we live in. It is contingent upon the constant availability of high-quality content, services and applications at broadband speeds to a dispersed set of consumers.

Attributes of Vision may include (variable based on the scorecard topic) Capacity, Ubiquity, Openness, Network Centricity, Innovation, Usability, Convergence, Contribution to Worker Mobility, Extension of Supply-Chain Interactions, IT Transformation, Connectivity, Context Awareness and Community Orientation.

Ability to Transform: "Who you are" can be just as important to your customers as "what you have" or "what you've planned." Financial strength, brand weight, pricing, channel strategy, customer stability and other core business metrics are critical, and often determinative, factors in how a market shakes out and who customers should select. This category uncovers the strengths and weaknesses of players' ability to deliver and succeed.

Attributes of Ability to Transform are Ecosystem, Portfolio/R&D, Management, Customer Base, Brand Reputation, Pricing and Financial Viability.

Calculating the final results

Upon completion of the analysis of all the evaluation categories and underlying attributes, the Anywhere Scorecard is weighted at three distinct points to compile the final scores.

1. The attributes within Vision are weighted relative to each other, and the attributes within Ability to Transform are weighted relative to each other. Attributes are given varying weighting percentages depending on the importance to customers in any given market. The percentages are vetted with both customers and scorecard participants.

2. The Vision subtotal and the Ability to Transform subtotal are weighted relative to each other. Depending on the maturity of the market, the importance of Vision or Ability to Transform varies both in determining winners and losers and in guiding customer decisions. Three typical scenarios dictate the weighting options, which are subject to change based on the market in question:
 - **Mature:** 40 percent Vision, 60 percent Ability to Transform
 - **Growth:** 50 percent Vision, 50 percent Ability to Transform
 - **Nascent:** 60 percent Vision, 40 percent Ability to Transform
3. Most players will score between a 25 and a 75, on a scale of 1 to 100, in the final scoring. This creates a natural convergence toward the mean, and to account for this we apply a bell curve to align the vendors across four sectors: Front-runners, Contenders, Competitors and Followers.



Related Information

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Learn more

For further information on Anywhere Scorecards, or to suggest a topic, please contact scorecards@yankeegroup.com.

Yankee Group—the global connectivity experts

The people of Yankee Group are the global connectivity experts—the leading source of insight and counsel trusted by builders, operators and users of connectivity solutions for nearly 40 years. We are uniquely focused on the *evolution of Anywhere*, and chart the pace of technology change and its effect on networks, consumers and enterprises. For more information, visit <http://www.yankeegroup.com/>.

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Yankee Group Link

Yankee Group Link membership brings clients the insight, analysis and tools to navigate the global connectivity revolution. It provides timely, actionable and accessible research and data that analyze the impact of connectivity and the transformation it will create in driving enterprises and consumers to an Anywhere society. The result is an experience that no other market research firm can provide.

Link Research

Yankee Group's qualitative research forms the core of our offerings, with analysis focused exclusively on the transformational effects of the connectivity revolution. Our research reports arm you with the insight and analysis to make the right decisions today and tomorrow.

Link Data

Yankee Group's quantitative data analysis includes monitors, surveys and forecasts. Together with Link Research, our data connects you to the information you need to make the most informed strategic and tactical business decisions.

Link Interaction

Connect one-on-one with Yankee Group analysts to get answers to your most strategic and critical questions, as well as gain deeper insight into research and trends. We encourage you to have direction interaction with analysts through ongoing conversations, conference calls and briefings.

Link Consulting

Who better than Yankee Group to help you define key global connectivity strategies, scope major technology initiatives and determine your organization's readiness to undertake them, differentiate yourself competitively or guide initiatives around connectivity change? Our analysts apply Yankee Group research, methodologies, critical thinking and data to produce expert, timely, actionable results.

Link Events

The Anywhere revolution won't wait. Join our live debates to discuss the impact that ubiquitous connectivity will have on your future. Yankee Group's events—live and online—offer our clients new insight, knowledge and expertise to better understand and overcome the obstacles to succeed in this Anywhere revolution.

