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Volume 7, Number 7

## **Welcome!**

We are proud to have been featured in a case study published by well-known marketing site *MarketingSherpa*, describing our successful transition of *Strategy & Innovation* from a bimonthly, paid, print publication to a biweekly, free, online publication. Innosight Marketing Director Gretchen Rice and I spoke with the *MarketingSherpa* reporter about why we felt we needed to make such a transition and how we did it — essentially, that we felt if our priority was getting into the conversation about innovation and being able to share our insights, we needed to be able to distribute them more freely in a form that people could pass on. Our subscriber base has tripled since we made the transition, and we're glad that it's worked out so well. The *MarketingSherpa* piece is now behind their subscriber wall, so look for us to share some of our insights on this internal innovation project on the InnoBlog within the next couple of weeks.

Comments and suggestions are welcome – send them to [editor@strategyandinnovation.com](mailto:editor@strategyandinnovation.com).

—Renee Hopkins Callahan, Editor

## **Innosight News and Events**

I will be live-blogging and posting Twitter updates from the World Innovation Forum, May 5-6 in New York. Come say hello if you are planning to attend!

<http://us.hsmglobal.com/contenidos/wifhome.html>

Innosight's co-Founder and Chairman Mark Johnson will be on a panel discussing Green Business at the Forbes Business Visionaries Panel Event on Green Business, to be held April 22 in Chicago.

[http://www.innosight.com/news\\_events/event.html?id=771](http://www.innosight.com/news_events/event.html?id=771)

Innosight President Scott Anthony will be featured along with Vivian Schiller, president and CEO of National Public Radio in the webinar "Innovating through the Storm: Insights on the Disruption in the Media Industry", which will be held from 11 to 12 EST on May 14. Renee Hopkins Callahan, editor of "Strategy & Innovation", will moderate the discussion, which is sponsored by Microsoft's Fast Forward.

<https://www1.gotomeeting.com/register/307534729>

Front End of Innovation Conference, an annual PDMA-sponsored innovation event at which Innosight will be exhibiting, May 18 to 20, Boston World Trade Center and Seaport Hotel.

<http://www.iirusa.com/feiusa/fei-home.xml>

Mark Johnson will be also featured at a Forbes Business Visionaries Event in New York City on May 28.

[http://www.innosight.com/news\\_events/event.html?id=770](http://www.innosight.com/news_events/event.html?id=770)

Scott Anthony will also speak on "The Landscape Transformed: What HR Leaders Need to Know to Survive and Thrive In the New Economy" at the Executive HR Network Summit, sponsored by Harvard Business Press and the Society for Human Resource Management. The event will be at the Harvard faculty Club in Cambridge, MA.

[http://www.innosight.com/news\\_events/event.html?id=769](http://www.innosight.com/news_events/event.html?id=769)

## **Feature: Systematic Innovation and Organizational Decline**

GM illustrates the difficulty of trying to resurrect a failing organization

By David Hurst

GM and Chrysler are moving toward their fates with the inexorability of a Greek tragedy. Rick Wagoner is an unlikely candidate for a tragic hero, but he fits the requirements perfectly: he knew the prophecies and was nominally in charge of the last, best chance to save GM outside of bankruptcy. Despite the best of intentions and efforts, he failed. Now bankruptcy seems almost inevitable.

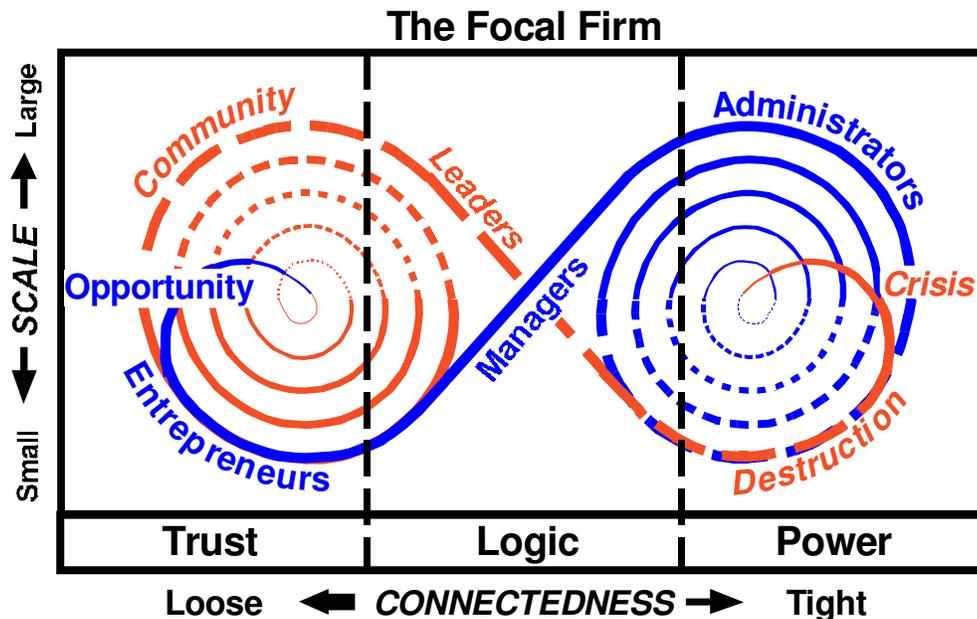
What is it about large, successful organizations that makes innovation within them so difficult? Charges of greed, complacency, and arrogance against the top executives may have merit in some cases, but they explain nothing.

### **Systematic innovation**

All evidence is that the problem is systemic — such organizations are perennially unable to disrupt themselves innovatively. And, if the constraints against disruptive innovation are systemic, then an equally systemic process of destruction and renewal is required to combat them. At the market level we call this process *capitalism*; at the firm level it is *systematic innovation*.

The best exponent of systematic innovation is nature; ecological models are helpful. In Figure 1 below, the organizational *ecocycle* shows the trajectories followed by a typical successful firm (an outline of this dynamic is available at <http://www.davidkhurst.com/Crisis-and-Renewal.pdf> ).

Figure 1



After a messy process of conception, enterprises are born in trust (bottom left). Once the recipe for success has been discovered, organizations grow through the use of management logic and mature in power (the system of hierarchical authority, which is essential to running a large-scale organization).

As large firms accumulate power, however, they become systemically constrained by the embodiment of their recipe for success in structures such as physical facilities, production systems, union agreements, organizational hierarchies, promotion policies, government regulation, and every other element of a corporate bureaucracy. Collectively these features are designed to perpetuate success within the existing arrangements; however, they permit only *incremental* change. Thus they also render the firm vulnerable to *disruptive* change. Worse, these strengths may become weaknesses as circumstances change to favor disruption.

Unless the organization has undergone systematic renewal, it begins to decline in a cyclical tempo, with periods of crisis interspersed with apparent recoveries. Detroit's Big Three probably entered this phase in the 1970s, catalyzed by the oil shocks of that time, and have been cycling in it ever

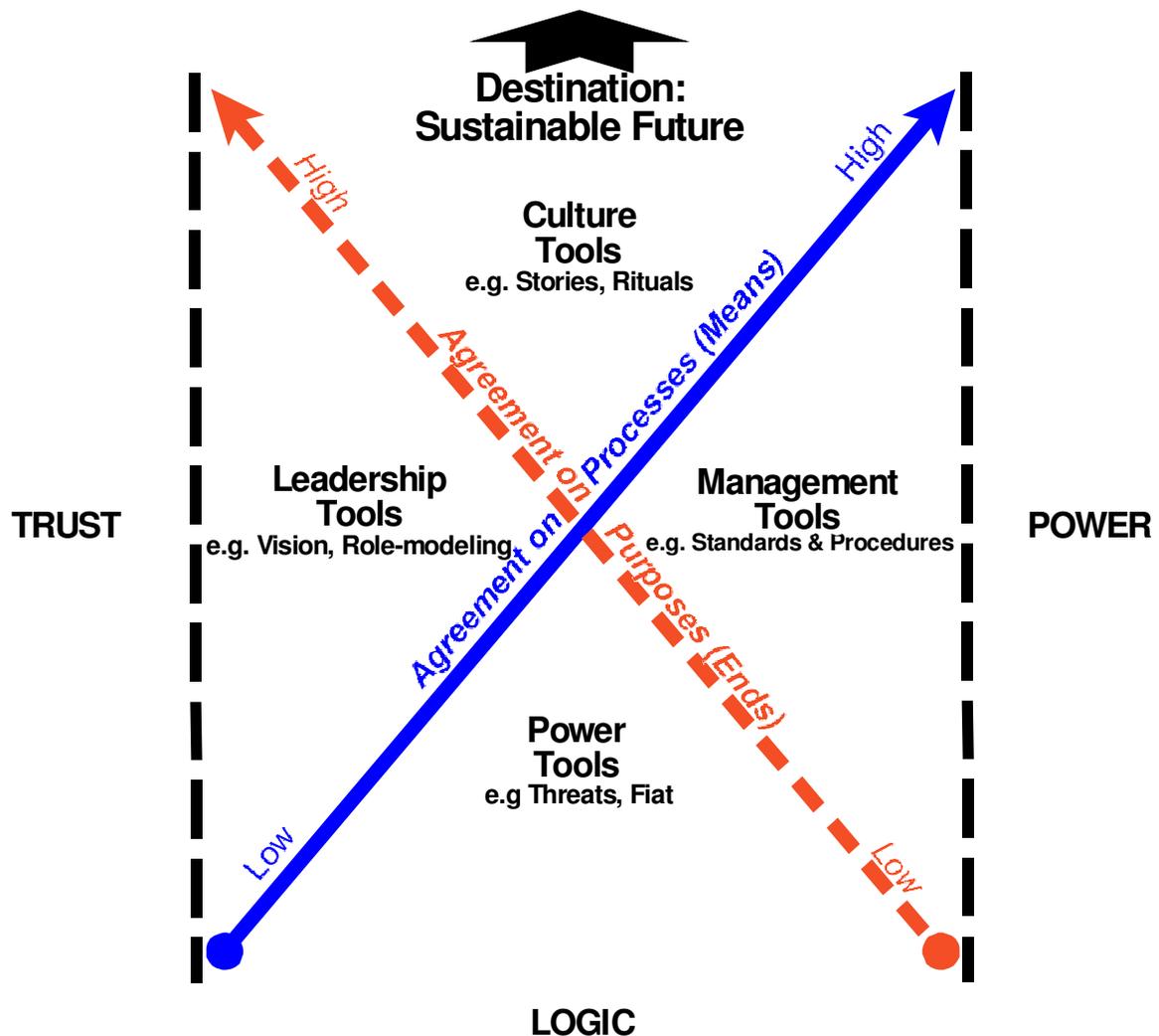
since. Currently Ford is at the zenith of the right-hand whirlpool cycle; GM and Chrysler are at the nadir.

### **Ecological dynamics**

The ecological perspective suggests a possible process of renewal, starting in destruction (lower right) and proceeding through the logic of leadership and the restoration of hope, confidence and cooperation to get the organization back to a community of trust (top left) — the soil in which innovation and entrepreneurship grow. Natural systems use crisis to renew themselves: some forests use fire, others wind and insect attack. Mangrove swamps thrive on hurricanes; rivers must flood. New growth can take place only on edges and in open patches, where there is easy access to sun and rain. Thus systematic innovation begins with acts of power — crises — to break the constraints that bind the system. Managers of fire-dependent forests have learned to use prescribed burns to renew them, creating small fires on their own timetables to avoid larger fires on someone else's. So it must be with human organizations; acts of power are needed to rupture the web of constraints that have built up, and to protect the open patches where small-scale experimentation can take place. These “prescribed burns” need to be frequent and on a small scale.

Thus there are two different kinds of logic required to run and systematically renew an organization. If the logic of management is the technical, instrumental logic of the firm as a system, then the logic of leadership is the values-based, human logic of people in their role as architects and designers; creators of their world, not just rational utility maximizers. Thus effective leadership affords people opportunities to cooperate and to create. These logics are captured neatly by Clayton Christensen et al's “Agreement Matrix” in their article “Tools of Cooperation and Change” (*Harvard Business Review*, October 1, 2006). It indicates that the role and use of each logic depends upon the extent to which people agree with the purpose of the organization and the means employed to achieve it.

Figure 2



Dropped into the middle of the ecocycle, the 2x2 in Figure 2 becomes dynamic. It suggests that, at the birth of an enterprise, people share agreement on the purpose of the business but may have little accord on the processes — the means to achieve their goals. At this stage the necessary tools are leadership to build and maintain cooperation and purpose, and the exercise of power to get things done. As processes are borrowed and discovered and the organization grows, procedures and protocols that embody that power become essential to coping with increasing scale (the logic of management). The importance and influence of culture tools begins to grow as a history of success accumulates, affirming what the organization is and has accomplished.

With success and large scale, agreement on processes will be high but, once the founders are gone, the original mission of the firm may gradually be forgotten. Visceral, qualitative appreciations of customer needs are steadily replaced by abstract, quantitative summaries. Among GM's senior

executives the concept of an automobile morphed slowly from being an object of passion to being merely a means to success and power. This trend was abetted by the appointment of a steady stream of CEOs from the finance function, Wagoner's own route to the top. For GM, making money became regarded as an end in itself. The recall of Bob Lutz, a genuine "car guy," to the upper ranks in 2002 was much too little and at least twenty years too late. What had once been a culture built around purpose had long since become a culture based on means: GM had lost its memory.

### **Toward a Sustainable Organization**

The pathway to a sustainable future points upward. The challenge is to use the twin logics of management and leadership to navigate between trust and power and to avoid being sucked into the spiral traps at either extreme. On the left is the entrepreneurial trap — lots of churning and ideas, but nothing with promise emerges from all the activity, so it has the virtue of being a self-liquidating process. On the right is the far more insidious success trap — a systemic inability to reconsider the roots of the organization's achievements, especially when it is doing well. Under these circumstances the organization is unable to make disruptive changes preemptively, before events impose themselves upon it.

It can be done. In the case of Intel and its famous transformation from memories to microprocessors, the spark for the fire came from deep within the firm, where the resource-allocation process regularly restricted DRAM production in favor of the more profitable 80286 and 80386 chips. Far from formulating strategy, the role of senior management was to pay close attention, articulate what had already happened, and support the emerging direction and purpose. Other companies, like W.L. Gore & Associates, the makers of Gore-Tex fabrics, avoid products that threaten their innovative cultures by taking them too far into the zone of management processes and power. This latter, "Rolls-Royce" strategy would, of course, never have been a serious option for GM.

Without regular challenges to its supremacy and way of doing things, GM grew far into the upper right corner of the ecocycle where it became trapped in a dense web of constraints, many of which were of its own making. By the time the unfortunate Rick Wagoner assumed the top position in June 2000, it was far too late for any mortal to significantly alter GM's fate, even with complete knowledge of the future. The power of the past was too strong, with the dead hand of Alfred Sloan, the formidable architect of the GM business model, still firmly on the tiller. The ancient Greeks would have understood the hero's predicament perfectly and empathized deeply with his struggle against a cruel reality. Capitalism, on the other hand, like Nature itself, doesn't care.

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*Challenge of Organizational Change* (Harvard Business Press, 1995; paperback, 2002). He is an adjunct professor at the University of Regina's Kenneth Levene Graduate School of Business (<http://levene.uregina.ca/index.html>) and on the faculty of the Center for Creative Leadership (<http://www.ccl.org/leadership/index.aspx>), as well as a contributing editor at *strategy+business* (<http://www.strategy-business.com>).

Related reference

[http://harvardbusinessonline.hbsp.harvard.edu/b02/en/common/item\\_detail.jhtml;jsessionid=I3NV1EQL43MFEAKRGWDR5VQBKE0YIISW?id=R0610D](http://harvardbusinessonline.hbsp.harvard.edu/b02/en/common/item_detail.jhtml;jsessionid=I3NV1EQL43MFEAKRGWDR5VQBKE0YIISW?id=R0610D)

## **Innovator's Insight: Google (Finally) Finds its Voice**

Google Voice, the new and improved GrandCentral, actually sounds better than it is

By Andrew Laing

For people who spend a lot of time thinking about disruptive innovation, there are few companies more interesting to watch than Google. The many ad-supported online services it's been rolling out over the years have disrupted everything from libraries to snail mail to word processors, and the image it's acquired in the popular imagination as a sort of Anti-Microsoft – a young, nimble, innovative, un-evil kind of company – doesn't hurt either. Maybe now it's time to ask: What *isn't* Google disrupting out in Mountain View? Well, now that we've had some time to reflect on the mid-March release of Google Voice, it looks like one answer is: phones.

First, some background. Back in 2007, Google acquired a small but fascinating company called GrandCentral for about \$50 million, and it has reworked and expanded GrandCentral's innovative menu of features to create Google Voice. Although at the time there was some concern that GrandCentral would enter (and possibly never emerge from) what Slate's Farhad Manjoo called the "Google Black Hole" (see related reference), it's clear that Google has made a healthy investment creating a slick service with plenty of interesting features.

The new service, which should soon open its doors to new, non-GrandCentral users, assigns users a new, single phone number, and that number rings all of your phones at once. Google Voice offers some neat technological advances to help users manage phone calls: features available through the site include voicemail storage and computerized transcription, Gmail-like SMS storage (you can send SMS messages through the site as well), call blocking (it even plays a recording to tell persistent callers your number has been disconnected), conference calling, and the ability to place calls (although the calls are placed via your phone, so you won't save any minutes). In a nutshell, Google Voice makes managing your telephonic life a little easier.

So what does it all mean? Google has indicated that Google Voice will be free for users (except international calls – more on those below) and won't include ads, so there is little doubt that it will attract a healthy user base, but I'm not sure how much of an impact the service will have, either for the market or for Google itself.

## Big-picture market implications

Internet-based telephony (VoIP) has been getting a great deal of attention in recent years, and leading services Skype and Vonage have certainly had more than their share of attention from the media and from other companies (Skype was acquired by eBay, of all companies, in 2005 – see related reference). Commentators have speculated that Google Voice could be threatening to both these companies and to more “traditional” telecoms, but four factors make me skeptical (see related reference).

First, it’s not clear that the VoIP industry is a particularly attractive industry to enter, or that incumbents are doing at all well. Since its “most successful IPO in years” in 2006 (see related reference), Vonage stock has done nothing but decline (from above \$12 a share to less than 50 cents a share). Skype, on the other hand, is a fairly popular way to make free computer-to-computer video calls and has certainly done a fine job accumulating and pleasing users, but as a revenue generator for eBay it’s been very disappointing, and persistent rumors of a sale have been floating around for more than a year.

Second, VoIP’s woes aside, Google Voice’s Internet-based calling features don’t seem to be particularly attractive and seem designed to supplement, not replace, existing phones. Sure, you can initiate calls through the website, but unlike Skype, Google Voice routes those calls through your cell phone or landline, so you’re still basically using your old phone company and won’t save any minutes (although it’s worth noting that *international* calls are quite cheap if begun through Google Voice). Unlike Vonage, Google Voice can’t actually *replace* your phones; it just makes them easier to use.

Third, Google Voice’s success will depend on consumers’ willingness to adopt it — and the fact that Google is demanding consumers to change their telephonic habits may impede that adoption. Google Voice would shift the experiences of checking voicemail, sending text messages, and even making calls from the phone itself to the computer, and unless consumers see a substantial benefit they will not be motivated to make that change. On the other hand, many of us have demonstrated our willingness to make big changes to our communications habits (certainly, carrying phones around with us everywhere was a big change), so this obstacle may not be so problematic.

Fourth, I worry that the specific value proposition that Google Voice offers consumers — making your many phones easier to manage and coordinate — might simply become less relevant as we move away from the multi-line communications morass. Google Voice is great if I have a cell phone (or two), a landline at home, a landline at work, and maybe even more numbers at which I can be reached, but that scenario may be becoming less common. Home landline phone use, for instance, is steadily declining as more and more people rely entirely on cell phones, which themselves are becoming more capable of providing some of Google Voice’s services (or at least “good enough” substitutes – see related reference). I rely solely on my iPhone, for instance, for calls, voicemails, e-mails, and text messages, so routing them through Google Voice probably wouldn’t add much value for me.

At least in its current incarnation, Google Voice doesn't seem like it will be disruptive to incumbents, but as a "phone management" service (for lack of a better term) it does seem to offer some very attractive features, particularly for people who can be reached at many places with multiple phones at different times and have a lot of voicemail to manage.

### **Implications for Google**

But, what will Google Voice do for Google? As a way of convincing more people to spend more time on Google's ever-expanding suite of websites, Google Voice will almost certainly be effective — but how helpful will that traffic be in growing Google's revenue? A co-founder of GrandCentral has said fee-based international calls will generate enough revenue to pay for the service, but Google won't use it to sell ads (and if Google did begin to sift through voicemail transcriptions to target ads to users, privacy advocates would undoubtedly react negatively).

For now, it's not clear how valuable this new addition to Google's arsenal will be. That said, there is certainly disruptive potential for this kind of offering in the future, and I wouldn't be surprised if Google expands Google Voice in the coming months and years to turn it from a useful free service into a more robust offering that could actually replace (and not just augment) the phones we already have. Google has already helped build a mobile operating system, Android, that Google Voice could conceivably run on; the ability to make calls through this service running on a mobile device could lead to the creation of exactly the kind of communication hub I described above. As often happens, this disruptive model may simply take some time to emerge.

### **At the end of the day...**

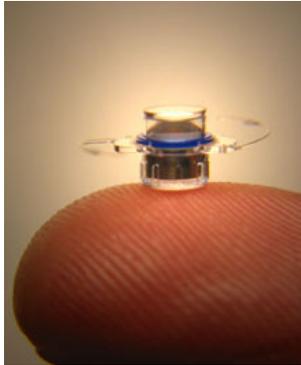
I have no doubt that Google Voice will be a helpful service for many people. I know I'm looking forward to the possibility of no longer having to call four or five numbers to find one person, and having my voicemail and text messages next to my e-mails in one place should be nice. That said, Google Voice won't revolutionize any industries (or convince people to abandon their phone companies), and it remains to be seen whether it will do much for Google once the excitement subsides.

### **Related references**

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## Emerging Technology Watch: Implantable Telescope for the Eye

By Renee Hopkins Callahan



Last week *MIT Technology Review* reported that an advisory panel for the FDA has recommended the approval of a new implantable telescope for the eye that could help with vision loss from macular degeneration, an age-related eye disease that is the leading cause of blindness in people age 65 and older, affecting more than 10 million Americans (see related reference).

Macular degeneration damages the center of the retina, called the macula, which is especially important for reading, watching television, and recognizing faces. As the *Technology Review* article points out, while some treatments exist to slow progression of the disease, no treatments are currently available for those in the latest stages of the disease, who have irreversible damage to the macula. An estimated 50,000 to 70,000 people per year fall into this category.

The new implant, developed by start-up VisionCare Technology of Saratoga, CA (see related reference), consists of two lenses within a small glass tube. Once implanted inside the eye, it works like a fixed telephoto lens, acting in conjunction with the cornea to project a magnified image of whatever the wearer is looking at over a large part of the retina. Because only the central parts of the retina are damaged in the disease, magnifying the image on the eye allows the retinal cells outside the macula to detect the object and send that information to the brain.

The device is implanted in only one eye -- patients use this eye for detailed vision and the untreated eye for peripheral vision. That takes some getting used to, says Eli Peli (see related reference), a scientist at The Schepens Eye Research Institute, who has consulted for VisionCare. "Instead of using two parts of the same eye, they must switch between two eyes; if they see someone coming but can't tell who it is, they need to switch to other eye."

The device is expected to win final FDA approval in late 2009 and will be on the market in the U.S. shortly thereafter.

*(Photo courtesy of VisionCare)*

Related references

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## From the InnoBlog

### When Does It Make Sense to be a 'Fast Follower'?

By Steve Wunker

We often hear it: "Our innovation strategy is to be a fast follower." Too frequently, the person saying the phrase shakes her head as the words come out, oozing irony. The fast-follower approach has ended up pushing the company in many directions, with little strategic coherence. Worse, it has led the firm into competing head-on with entrenched incumbents rather than creating new markets.

Strategies like "fast follower" usually become popular for good reason. Oftentimes, however, they are transplanted from the industries where they emerged into settings where they are inappropriate. The challenge for firms is to distinguish which strategies fit their particular circumstances. We would suggest three settings in which a fast-follower approach makes good sense:

1. **Local market power** – Businesses with strong local economies of scale, such as grocery stores or newspapers, can easily look outside their home markets at how other firms are innovating for similar customers. The *Philadelphia Inquirer* may have much to learn from the *Detroit Free Press*, for example. Oftentimes companies in these industries will eagerly collaborate to share discoveries, and quickly copying successful experiments is sensible business practice.
2. **Asymmetric capabilities** – Big pharmaceutical companies have made excellent returns by being fast followers in drug categories, leveraging their sales capabilities to win market share even if their drugs' effectiveness is no better than that of the firms who were first to market. By being somewhat later to launch, they can learn from the pioneers' clinical trial results and avoid expensive failures. Yet this approach may have a limited shelf-life. In pharmaceuticals, insurers are increasingly pushing for cost-effective solutions, and they are not keen to subsidize large salesforces that may add little in terms of medical outcomes.
3. **Ability to create new offerings based on synthesized learnings** – Real-world experience is vastly preferable to countless hours spent brainstorming on a conference room whiteboard. The trick is to synthesize among a large number of experiments in-market, and to create a unique offering that draws from these lessons. Rising mobile phone manufacturers such as LG have done this well; they have closely observed how users interact with models currently in the marketplace, and they incorporate key features while adding new ones, such as a mirror to help with applying make-up.

Unfortunately, the fast-follower approach tends to be adopted in a fourth circumstance: as the lowest common denominator on which everyone in a company can agree. After all, few firms will state that their innovation strategy is to be a distant laggard. The result is a fractured portfolio in direct competition with motivated market leaders.

## Business Model Innovation at HP: New Do-It-Yourself Print-Magazine Service

By Renee Hopkins Callahan

The proliferation of "good enough" alternatives has been a main driver of the current disruption of the media business. Good-enough is, of course, quite relative — citizen journalists offer a product that's good enough on some dimensions (see related reference), but for some audiences often is vastly superior to professional journalism on dimensions such as immediacy and depth of local knowledge.

"Do-it-yourself" media got another shot in the arm last week when HP announced its MagCloud service, which would allow anyone to create a glossy magazine (see related reference): "Charging 20 cents a page, paid only when a customer orders a copy, H.P. dreams of turning MagCloud into vanity publishing's equivalent of YouTube. The company, a leading maker of computers and printers, envisions people using their PCs to develop quick magazines commemorating their daughter's volleyball season or chronicling the intricacies of the Arizona cactus business."

John Boddie, formerly of Innosight Ventures, sent me an email commenting on this development:

"Print on demand has been around for a while and there may have been other companies that have tried to offer many of these features. One of the difficult things about disruption is watching the churning mass of contenders for a given disruptive play and figuring out which will finally arrive at the right combination of jobs-to-be-done and respect the right set of restrictions so that consumers on the other end can finally adopt. In this case, the choice of PDF for submission (rather than mucking around with a custom magazine generator) is key. Almost everyone now has some means of converting most document formats to PowerPoint. Almost everyone now has some means of converting most document formats to PDF. Eventually they might want to allow uploads from other content creation/distribution engines such as Slideshare and Blogger, but this is a great start."

The *New York Times* story also offers a couple of other clues as to the innovative potential of this idea, one in the very lead: "For anyone who has dreamed of creating his own glossy color magazine dedicated to a hobby like photography or travel, the high cost and hassle of printing has loomed as a big barrier." People who are intent on communicating around an interest about which they are passionate offers an attractive niche market to get the service off the ground and growing. Once that happens, there could be the up-market move that would potentially displace some existing print magazines.

Also, at the end of the story, HP offers a clue that they're going about this right: "For H.P., MagCloud is also a way to provide customized service at low risk. And if the niche does not thrive, the company will simply move on. "We are trying to experiment with these new types of business models," said Andrew Bolwell, head of the MagCloud effort. This kind of emergent-strategy approach of setting up a business unit to experiment with a new model is what we would

recommend any existing company like HP. In order to grow, they will have to find new markets. Setting up this kind of low-risk test is exactly the way to go about it.

Related references

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## **Disruptive Debate in the Blogosphere: Android vs. Windows**

By Krystin Stafford

Since *The Wall Street Journal* reported this week that PC makers are testing the Google Android operating system as a replacement for Microsoft Windows in netbooks (see related reference), the blogosphere has been abuzz and the debate is on. The big question amongst tech bloggers is whether Android will be able to replace Windows, or in Innosight-speak, if Android will be able to disrupt Windows.

Android is an open source platform that has recently been incorporated into several devices, notably the T-Mobile G1 (see related reference). Google does not charge manufacturers per copy of Android, which is fundamentally a different business model than Microsoft has taken with Windows, and provides some financial incentive for device manufacturers to adopt.

The question is whether the financial benefits of using Android outweigh the potential technical limitations and user interface issues. Most PC users are used to a Windows operating system (OS) and Microsoft products, and as a result, it may be difficult for users to switch to a different interface and set of software products. Similarly, because the software is not designed for compatibility with Windows, work that is done on one OS may not be transferable to another. You can get a taste of this debate on popular technology websites, from PC World to CNET (see related reference).

So, what would it take for Android be able to disrupt Windows? Android could disrupt Windows by finding those circumstances for which consumers are willing to trade-off familiarity for other benefits.

Android is unlikely to disrupt Windows from the traditional PC market in the near or medium term. Windows has a death-grip around the PC market and transitioning users to a new interface and programs is highly unlikely. With two newer device classes, netbooks and smartphones, Android stands a better chance of being successful.

We recently posted to the Innoblog about netbooks as disruptors (see related reference). By going after the low-end of the computer market and solving simple jobs (e.g., send email and browse the

Web), learning the new interface for a couple interactions in exchange for a low price point can be a reasonable trade-off. Smartphones are often used to accomplish similar jobs and because they need not support, for instance, word processing software, there are few barriers to Android adoption there as well. A disruptive play for Android today in low-end computing devices like smartphones and netbooks could also potentially move up-market over time to disrupt Windows on PCs as consumers get more familiar with the Android environment.

Will Android disrupt Windows? We'll keep you posted as this story develops further.

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<http://www.innosight.com/blog/332-netbooks-disruption-interrupted.html>

### **Innovation Links Posts**

We've started posting once or twice a week annotated links to various news and blog items of interest in the innovation world. Since the last *Strategy & Innovation* was published, this link has been posted:

April 1: <http://www.innosight.com/blog/338-innovation-links-for-april-1.html>

*Strategy & Innovation is published by Innosight, whose consulting and training services help companies create new growth through innovation. Building on the disruptive innovation frameworks developed by our founder, Harvard Business School professor Clayton Christensen, Innosight's approach and proprietary tools facilitate the discovery of new, high-growth markets and the rapid creation of breakthrough products and services. This new digital issue of Strategy & Innovation incorporates Innovators' Insights. If you have an issue that you would like analyzed or if you have a comment, please email [editor@strategyandinnovation.com](mailto:editor@strategyandinnovation.com).*