



NOW SERVING MILLENNIALS

How a Generational Cohort is Contouring the UC&C Landscape,
and Its Impact on the Service Provider



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By i3forum - Unified Communications Workgroup
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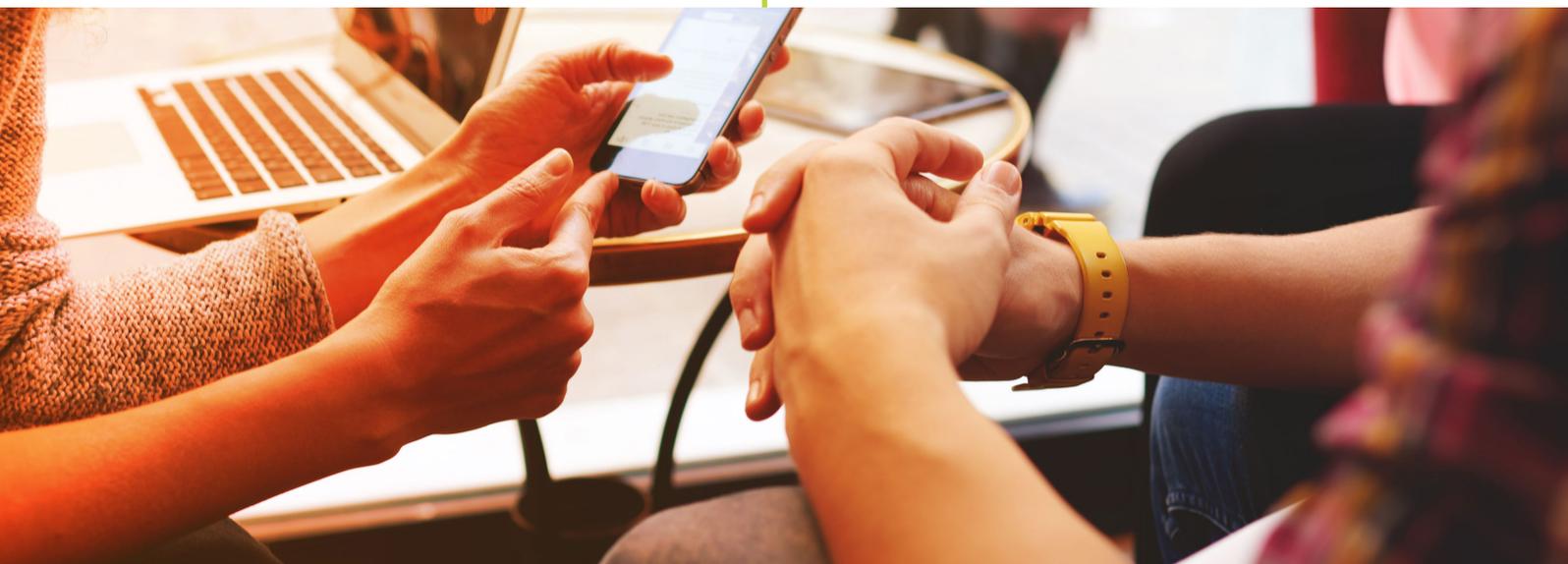
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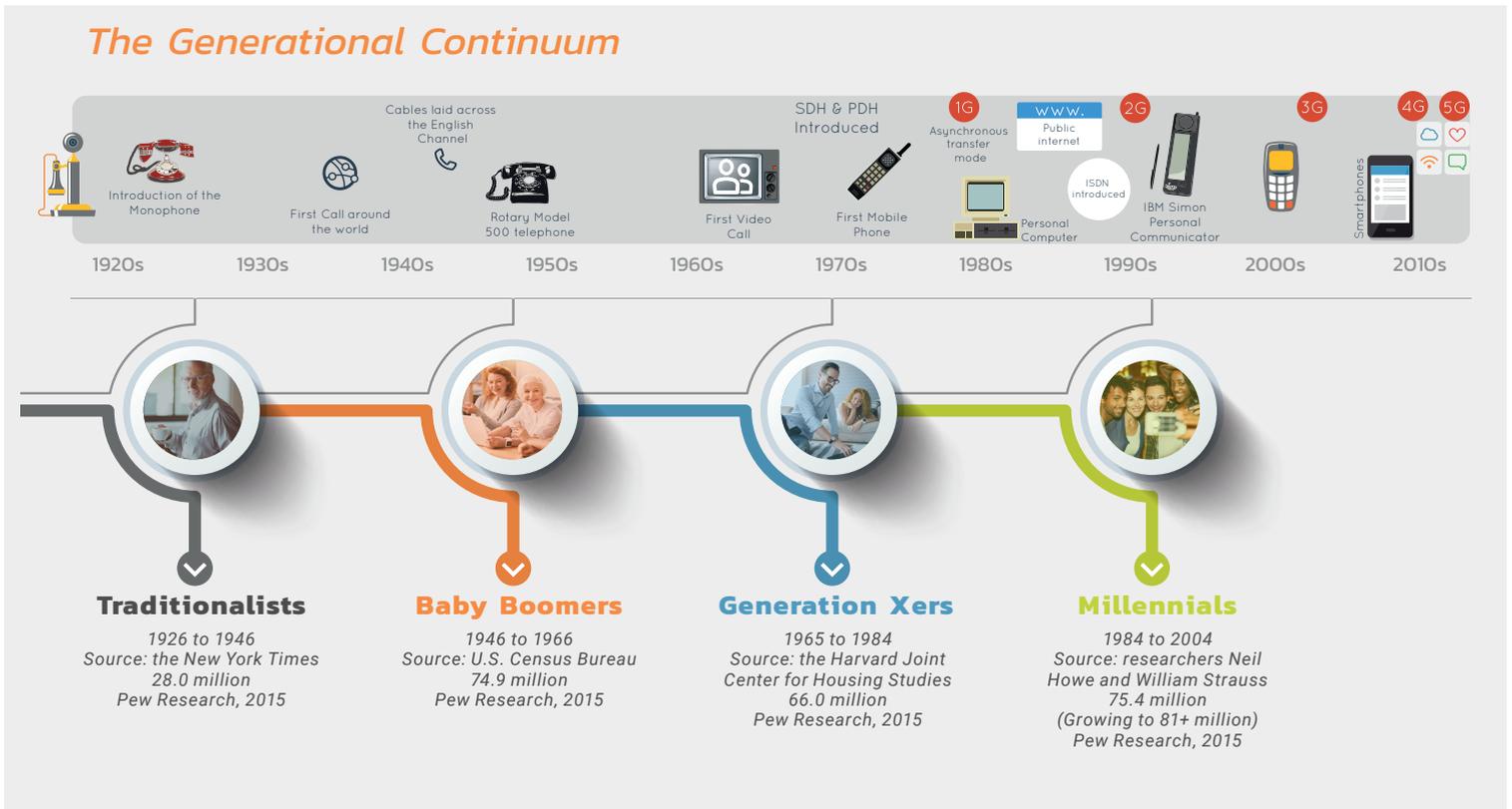
MAKE ROOM, BOOMERS; GIVE-WAY, GEN-X. Millennials are here, and their avant-garde fingerprints are everywhere, contouring the way we provision networks, driving the designs of our interfaces, and shaping the services we deliver. The reach is more substantial than many realize. According to researchers, this generational cohort will account for a staggering 75% of the entire workforce in the next seven years (Donston-Miller, 2016). But how are service providers reacting to this wave of change?

Writing for Entrepreneur Magazine, Judith Glaser says it best: "While some have criticized Millennials for their obsession with technology, they have been evolving as collaborators, multitaskers and consumers of complex information. In short, they are becoming exactly the kind of employees and leadership an organization can leverage in today's interconnected world" (Glaser, 2015). Armed with this realization, how can service providers define tomorrow's requirements and succeed in an age of disruptive technology and rapid digital transformation? And how might this affect the i3forum community in regards to the UCC landscape? Before answering these questions, let's examine the generational continuum, and canvass research relevant to this discussion.



The Most Studied Generation in History: Facts, Observations

As the first digital natives born into a rich technological era, Millennials have forged a unique place in the history of the world, exhibiting attributes and insights from those prior. An exact Millennial “age range” is not prescribed by governmental bureaus as it was for the Baby Boomer generation, so slight variations in dates are found when defining these constituents. The image below provides a middle-ground lineup of four generations, ranging from Traditionalists to Millennials.



Studies show several interesting reflections that can be summarized, revealing statistics and observational behaviour across several vectors. Permeating the corporate culture of the workplace, the marks of Millennials are highly purpose-driven, shaping today’s global economy in new ways with measurable differences from Baby Boomers or Generation X.



Millennial Observations

MILLENNIAL STATISTICS

- Have the highest average number of active Facebook friends, with an average of 250 friends vs. Generations X's 190.
- Text messages outrank phone calls as the dominant form of communication. (Gallop)
- Send and receive 110 text messages a day. (Verizon)
- Most Millennials (83%) open a text message within 90 seconds of receiving it. (OpenMarket)

MILLENNIAL BEHAVIOR

- Nearly half of Millennials are willing to promote products or services through social media in exchange for rewards. (OpenMarket)
- Only 5% of Millennials think that focus on profits will create businesses that are sustainable over the long term. (Deloitte)
- 90% of Millennials believe business should be measured beyond the bottom line. (Deloitte)
- Millennials prefer the WETeam approach for initiatives because it encourages more ideas which can be tested before implementation. (Inc.)
- 80% desire to work for a digitally enabled company or a digital leader. (Sloan Management Review)

Other key observations noteworthy regarding this generation. For instance, Millennials are:

- More highly educated than earlier generations according to Pew Research (Patten & Fry, 2015), especially where women are 4x more likely than Traditionalists to complete a bachelor's degree;
- Fluent with collaboration, team-based work projects and unstructured flow of information at all levels, according to Fortune Magazine (Williams & Spector, 2017);
- Hungry for a culture of collaboration according to a study by Deloitte, where this trait is one of the top decision criterion when looking for an employer (Smith & Turner, 2016);
- Seeking an open atmosphere to share ideas and innovative strategies (PricewaterhouseCoopers, 2016);
- Preferring casual ways of working according to an analysis by Forbes, both in terms of attire and workplace culture (Schawbel, 2016); and
- Wanting to focus on people and purpose, a greater good (Ace, 2016) than simply corporate profitability.

Smart leaders in the service provider community should harness the Millennial's sense of mission, desire for teaming, and culture of collaboration. Failure to satisfy these core desires risks losing these valuable assets to more purpose-driven companies. Yet how can we transform these observations into actionable triggers to accurately predict the future, enabling service provider innovation to empower and equip this generation through the vicissitudes of the next years?

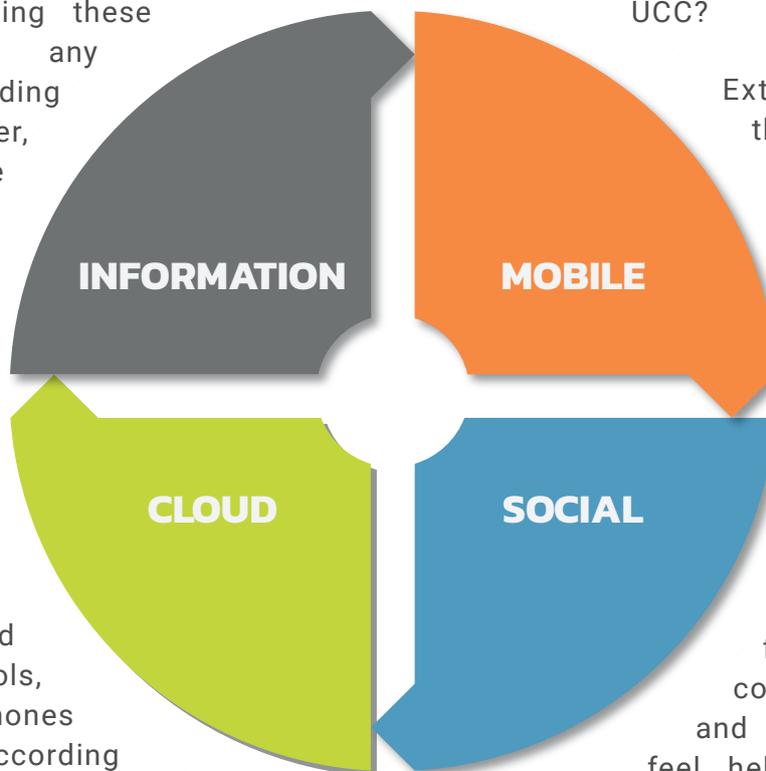
Service Providers, Embrace the Nexus of Forces

Two years ago, the consultancy Gartner Inc. unveiled a concept describing the convergence or “nexus” of four powerful forces on the digital transformation scene: mobile, social, cloud, and information. When rightly employed, these forces mutually strengthen one another to create new business opportunities and spark innovation, and appeal to the love language and intellectual wiring of the Millennial workforce. Integrating these capabilities into any enterprise, including the service provider, provides the framework for a healthy digital ecosystem.

Mobile Strategy:

Does your service provider strategy permit services to be consumed by and delivered to mobile tools, such as smartphones and tablets? According to a survey conducted by InformationWeek, 67% of Millennials employ smartphones or tablets for workplace activities compared to 18% of Baby Boomers (Sheridan, 2015). For instance, can both employees and customers alike use a mobile tool to open tickets or check ticketing status, request a live chat session, switch to audio or video when desired, or check / schedule resource availability? “Millennials routinely make use of their own technology at work and three-quarters believe that access to technology makes them more

effective at work,” according to a PwC study (PricewaterhouseCoopers, 2016). In many respects, this translates into having a BYOD strategy, both for employees and customers alike. Regarding the future of UCC, are service providers ready to support mobility with form factors that natively size to the user’s screen? Will audio and video, data sharing, chat and presence be supported across all platforms when employing UCC?



Extending services to the mobile domain is paramount for the next wave of customers. But historically, mobile technology has been somewhat taboo in the workplace, and leadership has prohibited its use. “Technology is often a catalyst for intergenerational conflict in the workplace and many Millennials feel held back by rigid or outdated working styles” (Ibid.)

This has historically been due to security and accountability concerns. Satisfying security concerns whilst enabling mobile flexibility should be part of the service provider’s strategy.

Regarding customers and mobility, Gartner recommends to discover “how to incorporate mobility into the organization’s business strategy and processes” (Beaudoin, 2015). Gartner adds, “Look for ways that mobile technologies can help to create new

business opportunities, improve customer interactions, or—ideally and—extend existing business processes.” A good way to start is by creating a cross-functional team charged to establish a mobile center of excellence, solving business challenges, setting mobile standards, providing mobile governance, integrating security as a design, and prioritizing efforts. Some of this may chart uncomfortable territory, but keep at it with optimism, looking for opportunities this might bring inside and outside the organization.

Social Strategy:

A study by Forbes revealed that 90% of Millennials currently use social media daily, and prefer to employ social messaging with collaborating team members compared to 36% of Baby Boomers (Johansson, 2016). This generation has a clear expectation of conducting business on social media. Once viewed as a personal tool not to be mixed with business, studies now find the “use of social media among companies across almost all industry sectors is exploding as a key element of business strategy, from engaging customers in real time to adding sales channels and enhancing brand and market research” (KPMG Advisory, 2017). Is

social media part of your service provider strategy? Does your strategy encourage social media participation from employees and customers alike?

For instance, can customers comment on your overall services, write a review about a new feature, or rate the release of a new tool? Writing for Forbes, Anna Johansson predicts in the next few years, ratings will be everywhere. “Millennials love rating and reviewing, and they trust reviews and user-generated content more than any other demographic” (Johansson, 2016). If you provide UCC services, how might social media integrate with your customer relationship management portal? This may take time to do, but start by ensuring social media is part of your company’s business strategy, and map where it makes sense to interconnect social media with customer-facing business processes.

From a scientific purview, studies show that social sharing is not only a smart way to vet trust amongst a community of peers, but it makes Millennials feel good. “Social sharing lights up a part of the brain called the temporoparietal junction which stimulates the production of oxytocin, the feel-good





hormone,” says Judith Glaser in Entrepreneur Magazine (Glaser, 2015). She adds, “Posting, IM-ing, liking, and sharing with each other... can give them an even higher oxytocin boost than interacting in person.” Whilst online reviews and posts are useful, consider quick and easy ways for users to contribute to the community. For instance, what can be done via one or two clicks to make it easy for users to participate? Some services enable users to rate the quality of their UCC conference from a five-star survey, a quick way to measure service and permit users to generate meaningful feedback. Vetting these opportunities may require changes to the user interface across all access methods, from mobility interfaces to desktop portals. But the right approach will ensure Millennials have a sense of contribution to their digital world, improving the service for everyone.

From a customer service perspective, how might service delivery be improved by social media? Millennials have a clear expectation of conjoining business with social media in the evolving world. For example, Twitter provides user engagement, but can also

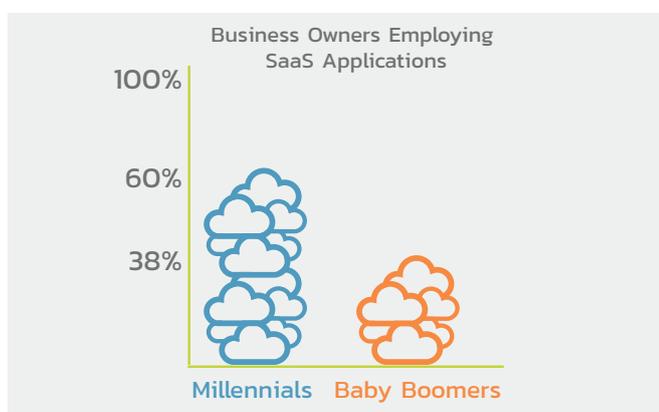
allow businesses to respond to customer concerns in a timely manner. Writing for Entrepreneur Magazine, Rustam Singh notes that “when someone tweets to a brand or a CEO of a business on Twitter... it is visible to everyone on the globe” (Singh, 2016). He notes how this powerful tool works to bring together consumer needs and employee tools, enabling quick resolutions across a free platform. How might the service provider build this integration into their platform natively? To some, the risk of derogatory media keeps enterprises from employing this model. But even when problems are made public by disgruntled users, savvy responses often result in impressive resolutions for all to see, increasing the provider’s credibility in the eyes of the public.

Take the time necessary to integrate social media into the overall business strategy. It’s only a matter of time before competitors offer similar integrated services, so don’t be left behind. Forbes predicts that “as Millennials start claiming higher positions of leadership, we’ll see a massive shift in how social media is used from a professional standpoint”

(Johansson, 2016).

Cloud Strategy:

It's probably no surprise that Millennials and the cloud seem to be a perfect match. Approximately 60% of Millennial business owners employ SaaS applications for collaboration compared to 38% of Baby Boomers (Ace, 2016). According to CIO Magazine, a study by Microsoft and Wakefield Research shows Millennials are "more likely than their non-millennial peers to push their organizations to embrace the public cloud and adjust IT policies to better enable innovation" (Olavsrud, 2017). This push comes from many vectors, including how it empowers workplace flexibility. "I think from the Millennials, what you see is the ability to work in a more flexible style," says Microsoft Corporate Vice President Julia White. "We are seeing CIO millennials. We're moving past the point where they are just influencers."



Is a cloud strategy baked into your business plan? What differentiators, such as webRTC and automated provisioning, might you offer customers as trends upsurge toward this direction? Can customers dial into the cloud to perform a self-check of their video platform, whether SIP or H.323? When developing your approach, remember that a proper cloud strategy should be equally integrated with one's mobile strategy. From an

employee perspective, Gartner recommends having a strategy that enables staff to use their own devices and applications at work, either with Google Apps or Office 365, along with cloud-enabled real-time collaboration tools (Cain, Austin, & Gotta, 2015). Cloud and mobile together enable the kind of flexibility Millennials customers desire.

Information Strategy:

How might an information strategy conjoin with the other Nexus of Forces to differentiate service providers in today's changing UCC landscape? To start, workers expect their tools to mimic consumer trends such as real-time file-sharing with mobile access and multiple device synchronization. They expect to search enterprise repositories with the same speed and results as Google. They expect personal analytics and customizable dashboards for tracking activities, following progress across teams, employing integrated reminders for team deliverables. The Millennials, unlike any other generation, are an analytic, data-driven culture.

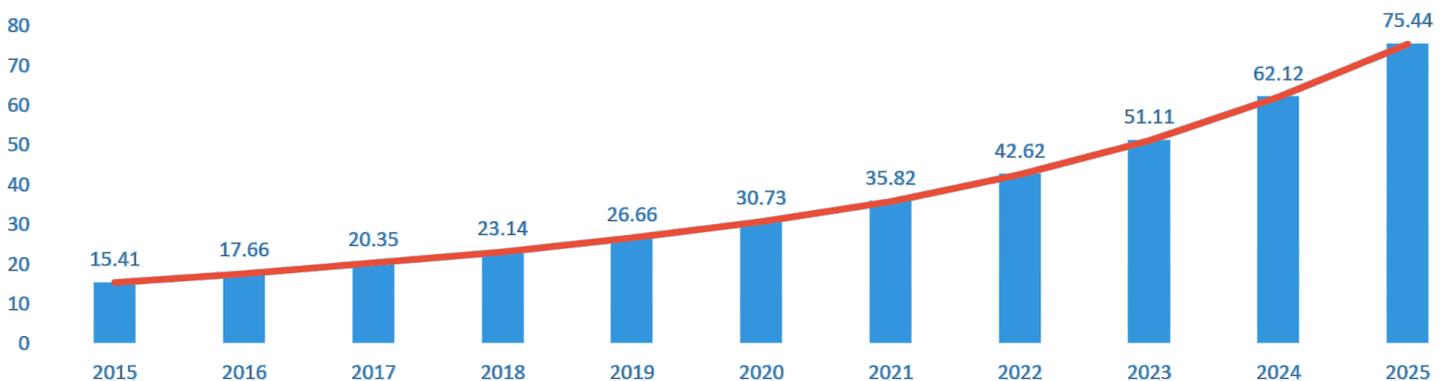
From a service provider perspective, do you promote a data-driven culture? Gartner found that 80% of CEOs claim to have operationalized the notion of data as an asset, but only 10% say that their company actually treats it that way (Duncan & Buytendijk, 2015). "To overcome these and other aspects, it is recommended that business executives and analytics leaders recognize the characteristics of a data-driven culture and identify opportunities to introduce relevant behaviors to foster evidence-based decision making as a core part of the digital workplace" (Ibid.). Yet how might these facets be woven together into a transformative business strategy, accurately predicting future trends and leading the charge in the industry?

The Undiscovered Frontier and the Service Provider

Whilst the Nexus of Forces are a compelling quartet of change in today's interconnected world, an undiscovered frontier is yet to be fully realized by the service provider. To frame the context, a communication revolution has profoundly changed the face of society over the last ten years. Facebook, Slack, Skype, Twitter, Instagram, Amazon Chime and others have wired together humanity in an interconnected mesh, enabling instantaneous, global communication. But for Millennials, global communication with each other is not enough, because not only do Millennials want to talk to one another, but they want to talk to "things" – the Internet of Things: checking biometrics from smartwatches, confirming the IoT garage door is closed, monitoring residential power consumption metrics, arming and disarming the home alarm system. The UCC sphere is quickly extending beyond the humanoid, contouring the landscape in profound ways. This is the vast, undiscovered frontier, and it's just beginning.

According to McKinsey & Company, IDC, and others, human-to-human communication will be eclipsed by the desire to communicate with things, the Internet of Things, or IoT. Already 17 billion devices strong as of 2017, the IoT is predicted to grow to 75 billion uniquely addressable devices by 2025. The playing field is so vast, it is this writer's opinion that the IoT should be the fifth element in the Nexus of Forces: mobile, social, cloud, information, and IoT. A survey published in Wired Magazine shows the impact of the IoT to be so substantial that 96% of all senior executives expect their business to be using the IoT in some respect to either gain a competitive edge or simply stay in the game (Binns, 2014). The article *How Millennials Created the IoT Without Knowing* makes a compelling case where digital natives are the driving force behind this wave, trailblazing the way for Generation Z to enter an era where computational devices outnumber humanity 10-to-1 (Ibid.).

IoT Installed Base, Global Market, Billions



To many, the IoT sounds enigmatic, like something taken from a sci-fi movie where cars drive themselves and refrigerators add “more milk” to the shopping list. But this description defines the scene unfolding in our midst, and to the Millennial, it’s marvelous. Larry Alton writing for DZone describes it this way: “Millennials are triggering the progression of the IoT and everyone else is essentially appeasing this demand” (Alton, 2015). Alton adds that Baby Boomers are fine with using technology for a time and then shutting it off, but for Millennials, there’s nothing wrong with being connected 24-7-365. “When they retreat to their living spaces, Millennials don’t want connectivity to cease – they want it to be enhanced.”

How does this affect the service provider in the coming years? There are many revenue opportunities in this space: IoT unit revenue, installation revenue, device management revenue, maintenance revenue, analysis revenue, connectivity revenue, application revenue, data storage revenue, and security revenue. Machina Research estimates the opportunity to generate \$3 trillion by 2025. Jim Morrish, chief research officer of

Machina Research says that “in ten years’ time, doing IT without consideration of IoT standards would be strange, as it is an opportunity as well as a threat” (Maru, 2016). It’s an opportunity for those with a detailed digital strategy, and a threat for those who do not have one; this is covered more fully in the next section.

To be sure, the IoT is a vast opportunity for the service provider, an undiscovered frontier boasting lush, green pastures. Paired with the Nexus of Forces, the five-fold combination can be a multifaceted powerhouse when rightly woven into a digital strategy. But defining the strategy and finding the promised land are two bookends of a continuum that must be bridged, and that corporate canyon can be fraught with perils unless a digital transformation is carefully circumnavigated.



The Digital Transformation and the Service Provider

Enterprises worry about the unpredictable, digital disruption effect of new technology. How might the Nexus of Forces + IoT be interwoven into a helpful ensemble that leads instead of follows? In today's age when an app from Apple is downloaded every single millisecond, it seems like the pace of business is getting quicker. But even Apple must keep up with the pace of rapid change.

Often the best prediction of future trends is for the savvy enterprise to invent it. A new book, "Building Digital Culture: A Practical Guide to Successful Digital Transformation" explores how to navigate the rapid changes contouring the digital landscape. "Many industries, when technological disruption comes along, attempt to actively resist customer requirements. Customers have decided they want something different and the company's reaction is to ignore the change and carry on regardless" (Rowles & Brown, 2017). Will the service provider ignore all indicators and carry on regardless? Or will the service provider investigate new requirements, analyze its ability to meet changing needs of users and business processes, align use cases, and innovate?

Before innovating, be mindful that it is strategy, not mere technology, that drives digital transformation. As noted by Nicholas Carr in Harvard Business Review, "technology should be a means to strategically potent ends" (Carr, 2003). Accordingly, the question is, how does a service provider create a digital strategy that transforms?

Start by discovering the mindset of the internal community. Poll the enterprise community; interview every area of the company to receive firsthand feedback from key stakeholders.

- Are stakeholders aware of the company's

goals and activities in regards to digital technologies?

- Do employees believe the company has a clearly understood digital strategy?
- How much do employees agree that the following objectives are part of the digital strategy?
 - To improve customer engagement
 - To improve business decision-making
 - To increase efficiency
 - To digitally transform / automate business processes
- To what depth does leadership believe the company employs each of the Nexus of Forces?
- Does leadership within the company understand emerging technologies and digital trends?

If responses across a broad base are inconsistent and indicate a lack of confidence, chances are a strategy is not clearly defined in writing, with an awareness campaign communicating the strategy to key stakeholders. Within the i3forum, it would also be interesting to discover how respondents rate each area, giving an indication of digital strategy maturity or immaturity throughout the community.

If the service provider does not have a strategic focus on how IoT will integrate with the Nexus of Forces, a strategy should be vetted. Here are some areas to consider in this search for strategy.

- What IoT talent does the organization possess?
- Does the organization have an IoT team or a steering committee, setting vision that's measured by goals?
- Will the service provider develop or purchase an IoT platform?
- Will the service provider focus on M2M or human-to-machine or both?

- How will older generation mobile technologies interact with IoT elements?
- What will 5G networks offer the IoT space?
- What is the competition doing, and what can be discovered about their strategy?

Be sure to ask the right questions to foster an enterprise-wide discussion amongst key stakeholders.

Second, create your digital roadmap, building a bridge from where you are to where you're going. It's often helpful to work backwards from the future to the present. Start with measurable business goals, then move to functional goals, and re-examine everything; there are no sacred cows when examining transformation. Be certain to link strategies directly to measurable business value. For example, achieving digital transformation requires rethinking the way service providers have traditionally approached many things:

Rethink talent: Achieving digital transformation may not occur with legacy talent; new thinking, new creativity will be needed. Millennials are often excellent contributors when it comes to surveying problems from a fresh perspective. But remember that engagement is key to Millennial employee retention.

Rethink networking: IDC predicts that within three years, half of IT networks will transition from having excess capacity to being network constrained due to IoT traffic, with 10% of sites being overwhelmed. Native IPv6 addressing will be a necessity for IoT deployment.

Rethink security: In an article called "The first big Internet of Things security breach is just around the corner," Danny

Palmer warns about possible hacking scenarios. "When you start thinking about a car, you quickly realise the integrity and vulnerability threats are much worse than confidentiality threats" (Palmer, 2016). Cybersecurity for IoT is not only common sense, but may be soon regulated in some geographies. Consider NIST Cybersecurity for IoT programmes, or ISO/IEC 27032 controls.

Rethink architecture: By 2020, IoT created data will be stored, processed, analyzed and acted upon close to or at the edge of networks. (Jadoul, 2015)

Value		Metric
1000	kB	kilobyte
1000 ²	MB	megabyte
1000 ³	GB	gigabyte
1000 ⁴	TB	terabyte
1000 ⁵	PB	petabyte
1000 ⁶	EB	exabyte
1000 ⁷	ZB	zettabyte
1000 ⁸	YB	yottabyte

Rethink data storage: By 2020, analysts estimate IoT devices will generate 44 zettabytes of data each year (McLellan, 2015). Service providers will need a big data strategy. Harvard Business Review warns that "one of the biggest hurdles for companies implementing IoT will be extracting insight from the incredible volumes of fast-moving data these systems produce and integrating that resulting intelligence into business processes in real time" (Harvard Business Review, 2017).

Third, once the strategy has been vetted and refined, leadership must lead digital transformation efforts by their own example, from the top-down. This cannot be emphasized enough. It's not enough to define the strategy; it's not enough to announce the strategy. Leadership must pave the way and lead by example regarding whatever initiative has been decided. This tenet is best underscored by the late philosopher Albert Schweitzer, "Example is not the main thing in influencing others; it is the only thing."



Think Big, and Start Small

The pace of change is accelerating, but it doesn't have to be frantic acceleration. Long term strategies still work, strategies that are framed by one generation, and carried out by another. "Our scientists have a ten-year view... If you don't take a long view, it is hard to keep your production costs consistent with Moore's Law," says Andy Bryant, chairman of Intel. Take a long-term approach to your digital strategy. Strategy is ongoing; its multigenerational; its aggregational, building upon the work of the Traditionalists, the Baby Boomers, Generation Xers, and now joined by a wave the Millennials. Strategy frames the big picture, but then applies a rational approach to entry.

So think big, service provider, and frame the big picture of your digital strategy. But start small, piloting an initiative, proving value, and experimenting with what works. And for the older generations, I say this from my own experience: don't forget to engage Millennials on a personal, transparent level. In his bestselling book *Promote Yourself*, Dan Schawbel reminds us not to forget that Millennials are like older generations in many ways:

They share same basic needs to belong and build relationships, and want to feel special and included. Yes, they're quick to adopt new technology, which forces older generations to change their habits in order to [keep up]. But what Millennials have taught us is that age doesn't matter, ideas and execution do. (Schawbel, Promote Yourself: The New Rules for Career Success, 2014)

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