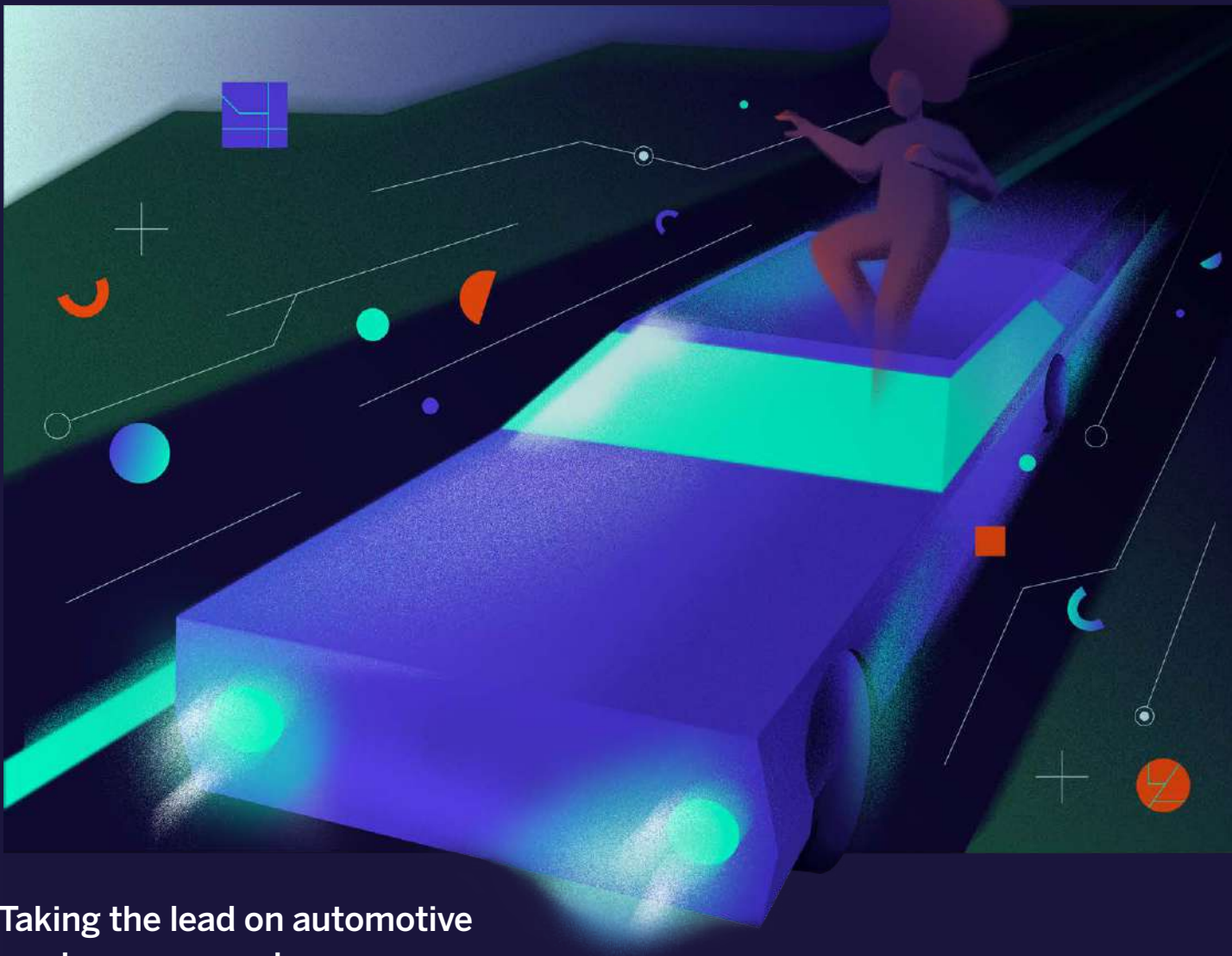




Beyond the Vehicle



Taking the lead on automotive
customer ecosystems

The Mullers' vacation is off to a bumpy start—a flat tire in the middle of the countryside, hours from their hotel, in the rain. But as we look through the car window, the family appears to be enjoying themselves. How is that possible?



They've made use of a broad ecosystem that has suggested a take-out service while they wait for roadside assistance. Sitting in their car, the Mullers have been offered a list of restaurants in the area, personalized to their preferences (kids' meals, dairy-free options, mid-range pricing). Payment was automatic and at a discount (a reward for sustainable driving). They elected to share their location with the delivery service so there is no need to try to explain where they are.

While they eat, the family is entertained by a quiz game in their car's entertainment package. The kids

chose the topic for this round—medieval legends—and they're beating the parents soundly. Soon, the parents give up. As their kids shout out the names of knights and wizards, they enable their zone-based work mode and wrap up some final issues from their workplaces via their car's conference call system. With this out of the way, they'll have nothing to worry about for two glorious weeks.

The tire is changed, and the Mullers drive on, their spirits high. The road ahead glistens in the headlights. Whatever happens along the way, they're ready for it.

Automotive OEMs can enrich customers' everyday lives with their vehicle and beyond.

Read on to learn how your OEM can take
the lead in customer ecosystems.

For today's customer, the car is just the starting point. An ecosystem-driven approach makes it possible for automotive OEMs to provide integrated, personalized offers, adding value and strengthening relationships. This is a chance to not only enrich current touchpoints, but to expand into new areas of life with incredible potential for growth.

In this report, we discuss building an ecosystem with the customer at the center.

- Are customers interested in an automotive ecosystem that supports them in their jobs and everyday life? In their hobbies?
- Is this primarily for younger drivers, or for customers of all ages?
- How strong is the demand—is a complex ecosystem worth the investment?
- How important is it to link physical and digital products into one cohesive ecosystem?

To answer these questions, we surveyed 1,000 consumers. The results of our survey help illuminate which areas of life to focus on, and how to define the scope of your portfolio.

Many players are involved in an ecosystem, including strategic partners and third parties with comprehensive solutions ready to integrate. We distinguish between the different roles your company can play, then walk you through a roadmap for building an ecosystem, enabling connected experiences. We conclude with our guiding principles.

Across industries, ecosystems meet customer demands to harness further revenue potential and increase customer loyalty through lock-in effects. They're coming to automotive. The question is—who will build them?

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Customer ecosystems on the rise

Integrated services can add value throughout your customers' daily lives—if you understand their needs.

New expectations

Our interaction with cars is changing fundamentally. A customer's choice of car used to be based almost entirely on their expectations for the driving experience—on factors like performance, design and safety. Today these expectations go further. Customers have experienced connected products and services in multiple industries, and they're increasingly projecting the same expectations onto their cars. Drivers today demand personalized, integrated products and services:

For today's automotive customers, additional applications are not enough. They want a cohesive set of products and services that are seamlessly connected and easy to use. We at frog, part of Capgemini Invent, believe that the creation of customer ecosystems is critical to meet customers' expectations today as well as in the future and to successfully keep customers inspired in an increasingly interconnected world. This is all a part of our global offering which we call the **Connected World**—creating products and services that connect people, planet and progress.

95%

of customers
require a seamless
process across online
and offline channels

86%

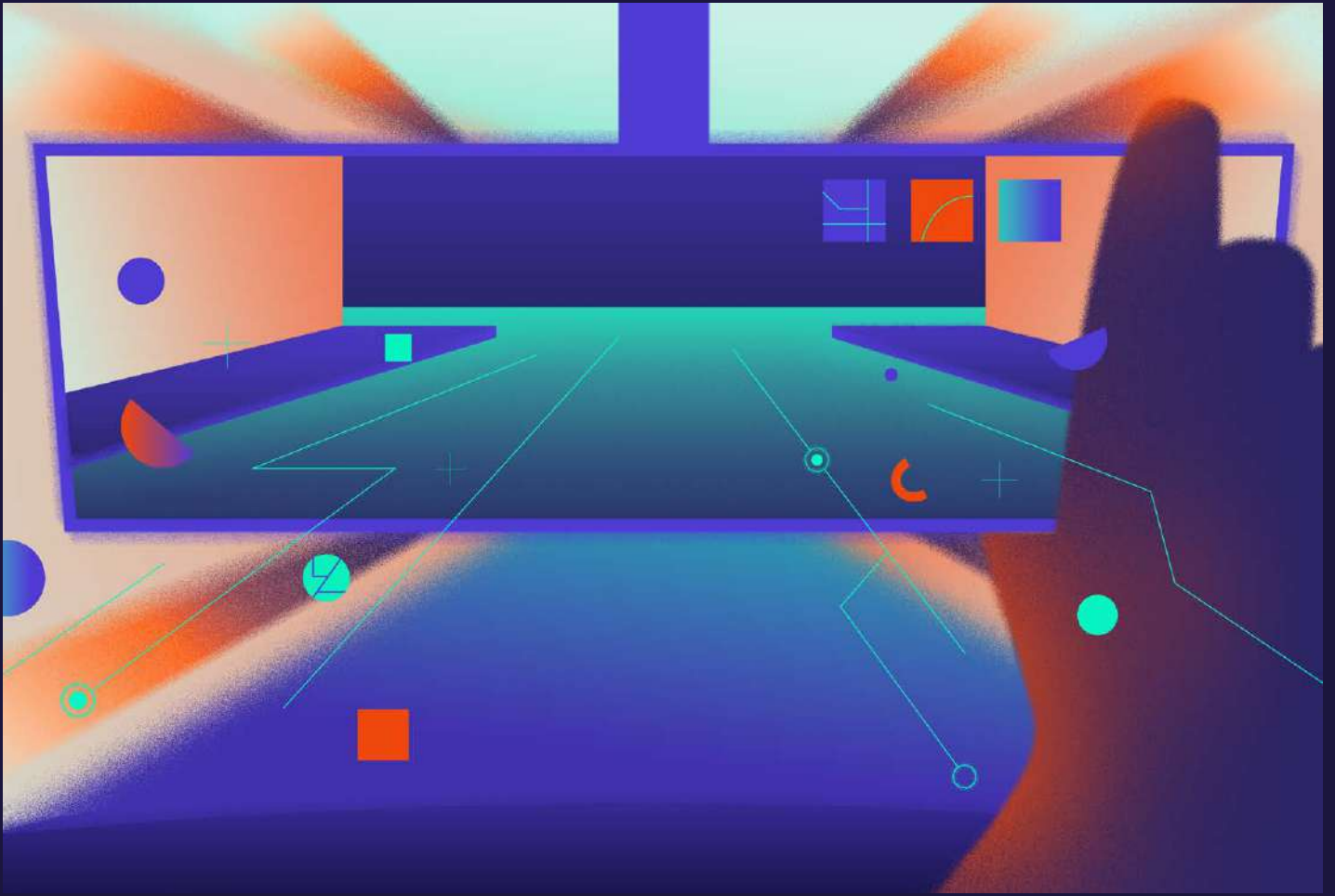
of customers
are willing to pay more
for a seamless
customer experience

65%

of customers
prefer to receive
personalized offers from
automotive OEMs instead
of 3rd parties

64%

of customers
are more likely to
recommend brands that
deliver experiences
to customers



Customer ecosystems provide an end-to-end experience by intelligently integrating services and products —physical and digital— into a seamless and comprehensive offer, covering multiple areas of life.

Becoming an everyday companion

Amazon provides an example of an effective customer ecosystem, offering services and products in multiple areas of life. A customer starts the day with Alexa, listens to a new song through Amazon Music, shops on Amazon Marketplace and ends the day with a movie on Amazon Prime. A single sign-on, cohesive solution allows for a seamless experience and simple, swift customer service. Amazon generates loyalty and builds a powerful lock-in effect, raising the threshold of switching to a competitor. These are standard benefits of a customer ecosystem. In times of growing competition, an extensive, well-rounded product and service offering attracts new customers, and keeps them in your sphere.

Automotive is taking their first steps to catch up with other industries. Some greenfield players (notably Tesla) are on a similar level, while traditional automotive OEMs are taking their first steps in this direction, with new products and services related to areas of life beyond mobility.

For example, Mercedes customers are now able to **play video games in their vehicle**, whereby a virtual car is controlled by the actual steering wheel.

Automotive OEMs
are doing their
homework, but are
they focusing on a
holistic customer
ecosystem strategy?



CASE STUDY: NIO

New BEV (Battery Electric Vehicle) OEMs are getting innovative. Let's have a look at **NIO**, a Chinese company that builds high-performance premium electric vehicles. NIO places a lot of emphasis on customer experience. Its ecosystem strategy provides a prime example of a customer-centric ecosystem covering different areas of life through online and offline touchpoints. What does this experience look like?

You're sitting on your couch, chatting with other NIO users via the NIO app, when one of them invites you to a social gathering at the popular NIO house later that evening. You activate the NIO power home plus charge, which ensures a full battery. You put on one of NIO's **merchandise shirts** and drive to the NIO house to attend the community event. In a large city where friends are hard to make, the NIO house can change your social life.

The importance for automotive

Strengthening customer relationships with every click

What is a customer ecosystem?

A customer ecosystem goes beyond additional products and services—it's the new world of engagement that arises when these services are linked. Customer ecosystems give automotive OEMs the chance to not only enrich their current customer touchpoints, but to expand into new areas of life.

A recent report from Capgemini Invent titled **Time to Level Up** focuses on the importance of CX within the automotive industry and how the right products and services in the right time and place can shape personalized, connected experiences.

Customer ecosystems—in any industry—are rarely built by one company in isolation. They are generally accomplished in collaboration with multiple third parties.

Defining your ecosystem

Putting the customer at the center is key to determining what is in and out of scope. The figure below illustrates where a customer ecosystem stands in relation to the core product (a vehicle) and the customer. Services can be profitably expanded up to the customer value border. Beyond that, they're unlikely to add value.

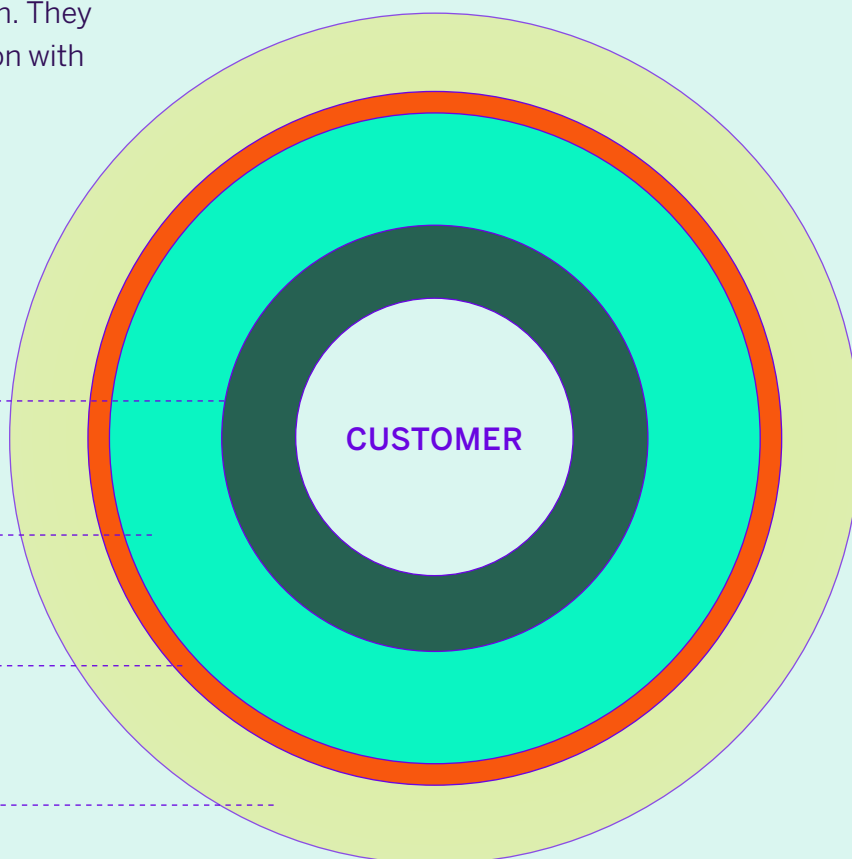
ESTABLISHING THE SCOPE OF YOUR ECOSYSTEM

VEHICLE RELATED
E.g. voice activation,
on-demand functions

BEYOND THE VEHICLE
E.g. health companion,
destination delivery

CUSTOMER VALUE BORDER
Beyond this point, services
lack value for customers

OUT OF SCOPE



Win-win-win

A customer ecosystem benefits all parties involved: customers, OEMs and partners.

- **CUSTOMERS** profit from an integrated offering tailored to personal needs.
- **OEMS** expand their offering to other areas of life, leading to new profit pools. They gain more customer data to better anticipate future needs. They can also expect greater customer loyalty and retention.
- **PARTNERS** grow their businesses through access to a larger customer base and cross-industry network effects, enabling a great source of innovation.

A customer ecosystem fully integrates products and services throughout multiple areas of a customer's life, adding value at every touchpoint.

CUSTOMER NEEDS PER AREA OF LIFE



Survey results

Which areas of life are most valuable? Here's what the customers say.

The customer's point of view

The benefits of the win-win-win situation are considerable—if automotive OEMs formulate a clear strategy that puts the customer's needs first. Through our experience and related projects, we see a clear shift on a global level towards customer ecosystems, especially in markets like China.

To better understand which areas are most relevant, we asked 1,000 participants between the ages of 18 and 45 in Germany to rate the relevancy of customer ecosystems in particular areas of life.

Customers rated Energy, Mobility and Financials as most valuable to them. This includes charging services as well as integrated payment solutions. In comparison, Gaming (for example,

the possibility to play games such as FIFA or Mario Kart in their car) was considered valuable by 41% of younger respondents—not a majority yet, but an area worth keeping an eye on.

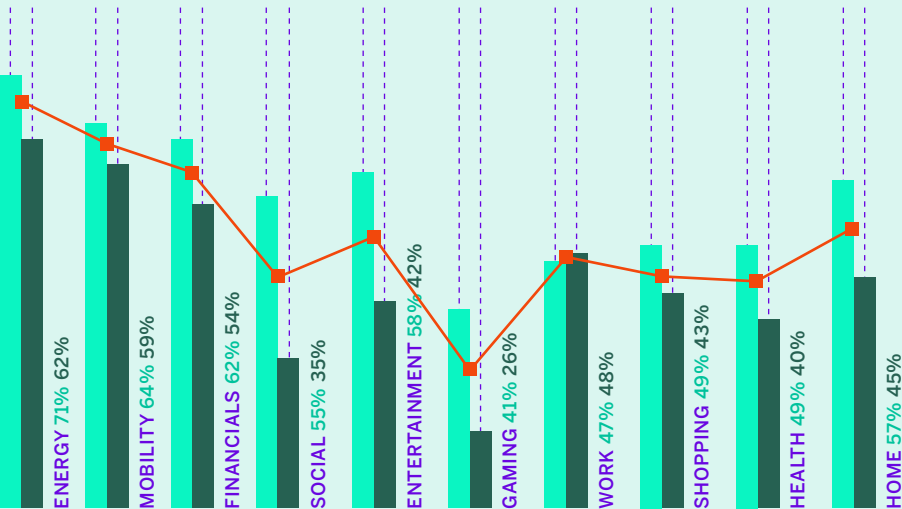
Social and Entertainment rank quite differently between the age groups: 58% of younger respondents are interested in watching movies and television series, compared to a smaller—but considerable—42% for older drivers.

Fortunately, customer ecosystems don't need to be the same for each customer. Just as all drivers like to have their seat in just the right position, each customer will choose the services that meet their individual wishes.

MOST VALUABLE AREAS OF LIFE BY AGE GROUP

Our oldest and youngest respondents differed in a few areas.

Ages 18–34 Ages 45–65 Average



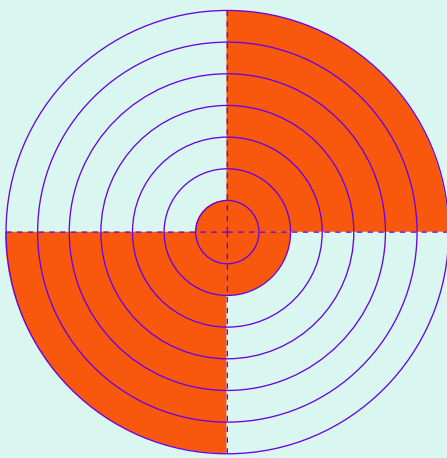
CUSTOMER INSIGHTS

- 70% prefer a customer ecosystem centered around their smartphone, which is completed by their vehicle.
- 65% are willing to share their vehicle data in order to receive additional services for free
- 68% see ecosystem-related initiatives as highly relevant for automotive OEMs to compete against the tech giants
- 57% view a seamless integration of all channels and devices into a customer ecosystem as the most important factor

Defining your role

Just as every ecosystem will vary, so will your role. Here we weigh the benefits for creators, orchestrators and collaborators.

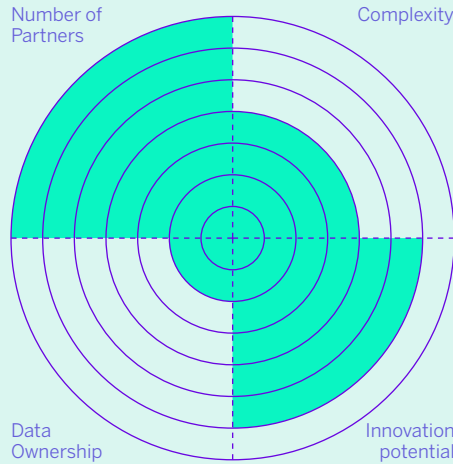
DIFFERENT ROLES IN A CONSUMER ECOSYSTEM



CREATOR

Building products and services independently and hosting them within your own ecosystem, with no other players involved.

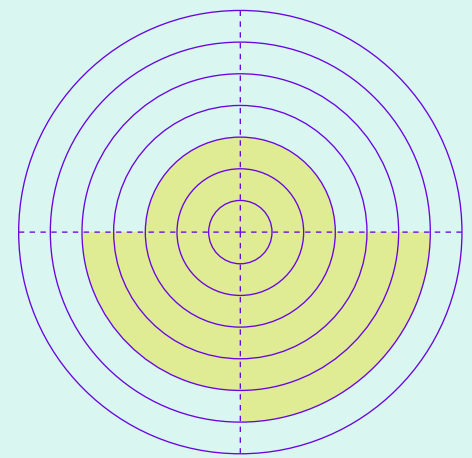
Example: WeChat independently built their digital wallet service allowing users to perform mobile payments and transfers.



ORCHESTRATOR

Offering the ecosystem platform which integrates products and services from other players.

Example: Amazon Marketplace enables sellers to list their products on Amazon.



COLLABORATOR

Entering an exclusive, strategic partnership that builds and integrates products and services into an enhanced portfolio offering.

Example: Amazon and Stellantis worked together to integrate customer-centric, connected in-car experiences.

You may also choose to create in one area and collaborate in another. Some of the pluses and minuses of each role will become clear as we move on to the heart of our report: how an ecosystem is created.

Strategy and scope

We've discussed why customer ecosystems are growing in popularity. Now let's walk through the process of building one.



From analysis to implementation

The strategy and scope of an ecosystem are likely to differ substantially from typical automotive projects. Automotive OEMs are comfortable with vehicle platform and manufacturing strategies, but digital products are a different beast entirely. OEMs often struggle with the speed of product and service development, the proliferation of new competitors and ever-changing customer demands.

Ecosystems comprise many areas of life. They often overlap and defining a strategy is complex. For example, the functionalities of the Apple Watch fall into several areas of life, including lifestyle, fitness, communication and finance. Apple has managed to cover many areas by integrating third-party apps, creating a strong lock-in effect. Users enjoy a seamless, end-to-end customer journey. But for Apple, the ecosystem is in constant motion. Customer expectations are always changing. Permissions and security settings need countless updates, and competition includes companies in entirely different industries. Maintaining their position is no small feat.

Designing a customer ecosystem strategy is a step into the unknown. Let's see what it involves.

“Ecosystems are highly relevant when they positively impact customer experiences. With improved experiences comes more customer interactions, more transactions and, ultimately, extended revenue potential.”

— Sebastian Tschödrich, Executive Vice President, Head of Global Automotive, Capgemini Invent

Designing for individuals

Imagine a young person living in the city, with limited time and a tight budget. Now think of a well-off retiree in the countryside with some money to spare. Analysis of each customer's individual priorities will help you determine what needs are already being filled and what pain points are waiting to be addressed.

The young person might be interested in home delivery and discount coupons that help save money and time. The retiree might be more interested in a rewards program that promises new travel experiences. The more you can define your customers and their needs, the stronger your offer will become.

KEY QUESTIONS TO DEFINE YOUR CUSTOMERS' NEEDS

Get a clear picture of the status quo

- Which products and services are your customers already using?
- Which areas of life do they fall into?
- What is their estimated technological life expectancy?
- What unmet needs do your customers have now?
- Will any new needs arise with new models?

Evaluate the profit potential

- How large is the potential market?
- What power do the buyer and supplier have?
- How large a share of the market do you control?
- What's your growth potential?
- What barriers are there to entering and exiting?
- What competitive advantages will you enjoy, i.e. brand loyalty or uniqueness of your product?

Evaluate the potential for customer value

- In each new area of life, what are the customer's needs?
- As a starting point, what needs do they have regarding mobility and finance, two of the highest rated areas of life?
- What can market testing reveal about the profit potential?
- How can you consider the context of a complete journey (e.g., recharging an electric battery, navigating to a station, passing time, rating the service, etc.)?

Weigh your company-specific requirements

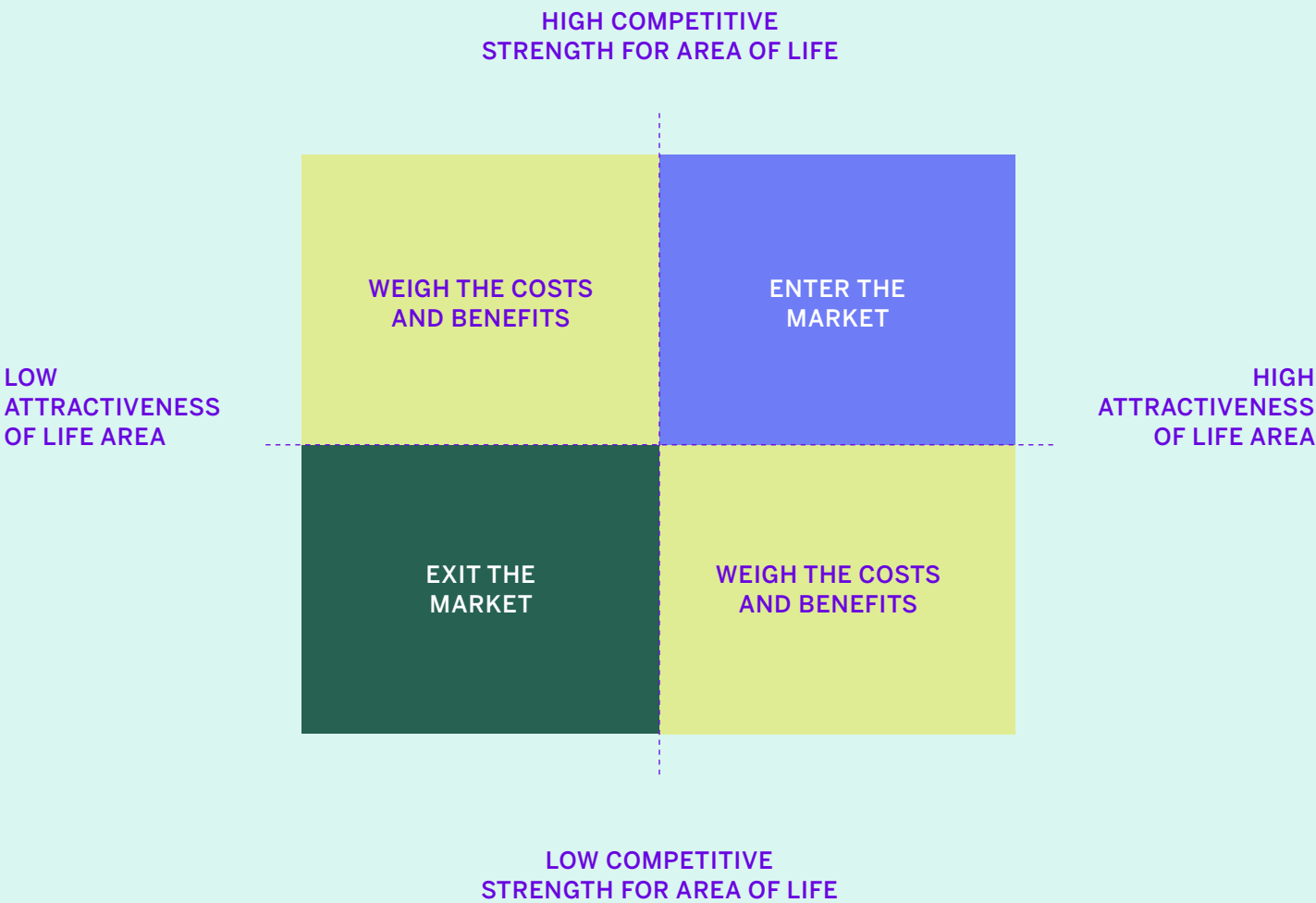
- How important is it for your company to own the data associated with each service?
- Would anything prevent you from sharing that data with partners?
- How much control would you prefer to have over final products?
- Long-term, which arrangement will continuously create the most value?

The ultimate decision of whether to enter the market with a given service comes down to a balance of attractiveness and your competitive strength. The results, of course, will never be a clear yes or no decision as there are many overlapping factors. Rather, they should support decision making within the company.

Existing portfolio governance structures and processes should be adapted to the needs of your new customer ecosystem. This also means being clear about the content of the ecosystem and its services to prevent misunderstandings within the organization.

Developing a comprehensive strategy for an automotive OEM involves key elements: effective communication of a strategic vision, breaking down goals and objectives, executing and monitoring them, and continuously improving your offering. Simultaneously, market volatility, customer demands, industry relationships and technological advancements must be assessed. Analyzing the baseline and future applications, along with implementing a governance structure, is crucial.

CHOOSING THE MOST PROMISING AREAS OF LIFE



Partnerships and operating model

Who you partner with and how

You've already considered your role as creator, orchestrator or collaborator. You can also choose your level of involvement, from total control to a broad partnership. One path does not exclude the others; they can differ per area of life and by your individual needs.

- **DO IT YOURSELF**

The automotive OEM bears the sole responsibility and risk and is independently responsible for operating the ecosystem—including product strategy, development, implementation and ongoing management.

- **BUY AND TAKE OVER**

In this approach, a company is bought out entirely, including its products and services, but there is still the effort of correct and meaningful integration into the ecosystem. The ecosystem and business operations are managed by the automotive OEM.

- **PARTNER WITH MANY**

Here, the responsibility for ecosystem management and integration also lies with the automotive OEM. Areas such as product strategy and design, on the other hand, remain the responsibility of both for their respective offerings.

- **PARTNER STRATEGICALLY**

In the strategic partnership approach, the product strategy and design lie with both parties, but the established and mature partner takes over overarching issues such as implementation and ecosystem management.

new products and services integrated into their existing ecosystem. The smartphone is an example of this model—as users acquire apps, they add them to an ecosystem based around their phone. It's important to assess what ecosystems your customers currently use. Partnering with the companies involved can provide a solid foundation.

Ensuring a profitable ecosystem

The next step to forming an attractive customer ecosystem is selecting a profitable business model. Here we consider several approaches:

- **MAKE TO SELL**

The automotive OEM creates its own products. This means full revenue potential, but also complete responsibility for costs, risk and time commitment.

- **INTEGRATE TO EXPAND**

The automotive OEM buys products and services to expand the ecosystem portfolio quickly. This involves high costs up front, but potentially strong revenue in the long term.

For an ecosystem to be profitable, it is not necessary for each element to yield a profit. Consider a restaurant that serves food at cost while turning a profit on drinks, or a supermarket that sells holiday foods at a discount and makes up the difference in volume. Foregoing revenue in some parts of your ecosystem may be strategic if it boosts overall engagement. Nothing will stunt your ecosystem faster than requiring a positive business case for every project.

Measuring the success of your ecosystem may require changes in both strategy and mindset. Let's take a deeper look now.

How do your customers' preferences inform your choice of operating model? Our research found that 57% of customers would like to see

Overcoming organizational challenges

A customer ecosystem goes beyond traditional organizational structures, requiring collaboration across business units and with partners and customers. Corporate silos need to be broken down so that information and resources can be transmitted across the organization. Creating an operating model for your customer ecosystem

requires clear scope definition, capability and role assessment, governance, aligned processes and budget responsibility. This operating model can also help prioritize actions and responsibilities, linking vehicle development with customer perspectives. Here we provide a set of questions and actions to guide the process.

QUESTIONS TO ASK

- What capabilities does your organization have?
- What new ones must be built up?
- Where are these capabilities allocated within the organization?
- Which ones are essential for the ecosystem “core” team?
- Which will need to be linked to other teams across the company?
- What are the most crucial roles in the ecosystem?
- How are responsibilities split for the most important functions?
- How do you steer and govern your ecosystem?
- How is decision making distributed across the ecosystem?
- What committees are relevant for the ecosystem?
- How do you collaborate internally and with partners?
- What are the core E2E processes you need to establish to cover service development from ideation to operations?
- How can budget and resources be flexible enough to manage change and adaptations?

ACTIONS TO TAKE

- **CUSTOMER-CENTRIC VALUE CREATION:** Set up value streams, such as service development streams, that enable more efficient resource allocation by preventing unnecessary overlaps of functions in multiple areas.
- **GOVERNANCE:** Define principles, guidelines and rules to empower decision making at key junctures (e.g., along the iterative development process, deciding whether development of a given service should be continued or not).
- **STEERING:** Provide strategic direction with overarching architectures and frameworks for all parties involved, such as ecosystem portfolio management.
- **ORGANIZATIONAL STRUCTURE:** Focus on capabilities and roles rather than on positions and functions, breaking existing silo-structures and enabling collaboration across business units.
- **PROCESS MODEL & COLLABORATION:** Develop a joint understanding with all stakeholders and a set of core processes.
- **MINDSET AND CULTURE:** Empower the entire ecosystem to pull together as one by fostering a culture of collaboration and trust (e.g., by setting joint targets, ensuring regular exchanges across teams).

Success measurement

A KPI strategy for customer ecosystems

Business consultant Peter Drucker once said
“You can’t improve what you don’t measure.”

Measuring success begins with data. A system of KPIs is essential for ensuring that complex pieces

of your ecosystem are working well together and your goals are on track. We suggest a two-pronged approach, consisting of both bottom-up and top-down assessments.

Bottom-up KPIs

These track the success of individual products and services, and include such metrics as:

- **NET PROMOTER SCORE (NPS)**
- **STAR RATING**
- **ACTIVE USAGE**
- **NUMBER OF INTERACTIONS**
- **FREQUENCY OF SERVICE USAGE**
- **FREQUENCY OF PURCHASES**

Top-down KPIs

Here you’re tracking the success of your overall system, including how your different products and services support and complement each other. Top-down KPIs and KPI indices include:

- **THE TOTAL NUMBER OF ALL ACTIVE ECOSYSTEM USERS**
- **CUSTOMER SATISFACTION**
- **SERVICE STABILITY**
- **INTERACTION INTENSITY**
- **RECURRING TRANSACTIONS**
- **TOTAL REVENUE**

It’s possible (even likely) for an individual service to score differently in the bottom-up and top-down analyses. An application that’s very popular, but not turning a profit on its own, may still play an integral role in the functioning of the ecosystem as a whole.

These sorts of considerations often require a shift in mindsets and should be discussed when defining KPIs and goals.

The approach we discuss is being used by successful platform businesses and new OEMs, especially in China, and are integral to their

customer engagement and the ultimate success of their ecosystems.

A comprehensive KPI strategy is complex, requiring ample resources in terms of time and budget, as well as a robust system of data gathering and analysis.

Capgemini Invent explored ways for automotive OEMs to monetize vehicle and product data in a recent report titled **“The Vehicle Data Big Bang.”** In our final chapter, we turn to the role of data and technology in customer experience.

Technology and data

The foundation of your customer ecosystem

Creating an outstanding customer experience in the digital world is complex, but feasible. Here are two basic roads to consider.

Build your own technology

Building your tech in-house allows for the effortless integration of third parties, protects the ownership of valuable customer data and sets the stage for boundless technological growth aligned to your overarching strategic direction.

CASE STUDY

Tesla is a perfect example of a customer ecosystem one-stop-shop, powered by Tesla's "central nervous system," which controls nearly every aspect of business operations. This "central nervous system" exists because in Tesla's early days, agile and robust solutions were not available. Tesla thus built their own IT systems in-house. Today Tesla's enterprise software is one of the most valuable technologies in the entire company.

"Something that people don't really even know much about is our internal applications team that writes the core technology that runs the company. We are not dependent on [third party] enterprise software."

– [Elon Musk](#)

Partner with a tech leader

A strategic partnership starts out with a functional ecosystem, and likely even an established customer base. The integration of existing capabilities comes with low financial risk and costs for research and development.

CASE STUDY

A recent example is the [partnership between Volvo and Google](#). Volvo will continue to provide an infotainment system—powered by Android Automotive OS with Google Assistant, Google Maps and Google Play built in—but is taking connected infotainment to the next level with an all-embracing ecosystem hosted within their new operating system, VolvoCars.OS.

This direct integration with Google enables the most seamless connection ever between the Google Assistant and the car. Volvo Cars customers can issue voice commands to their Google Assistant-enabled home and mobile devices. They can talk to Google directly from their cars, and talk to their cars through Google Assistant, for example to pre-warm their seat on a cold winter day.

No matter who you partner with or how you manage your technology and data, there are elements of a successful ecosystem that never change.

Data at the core

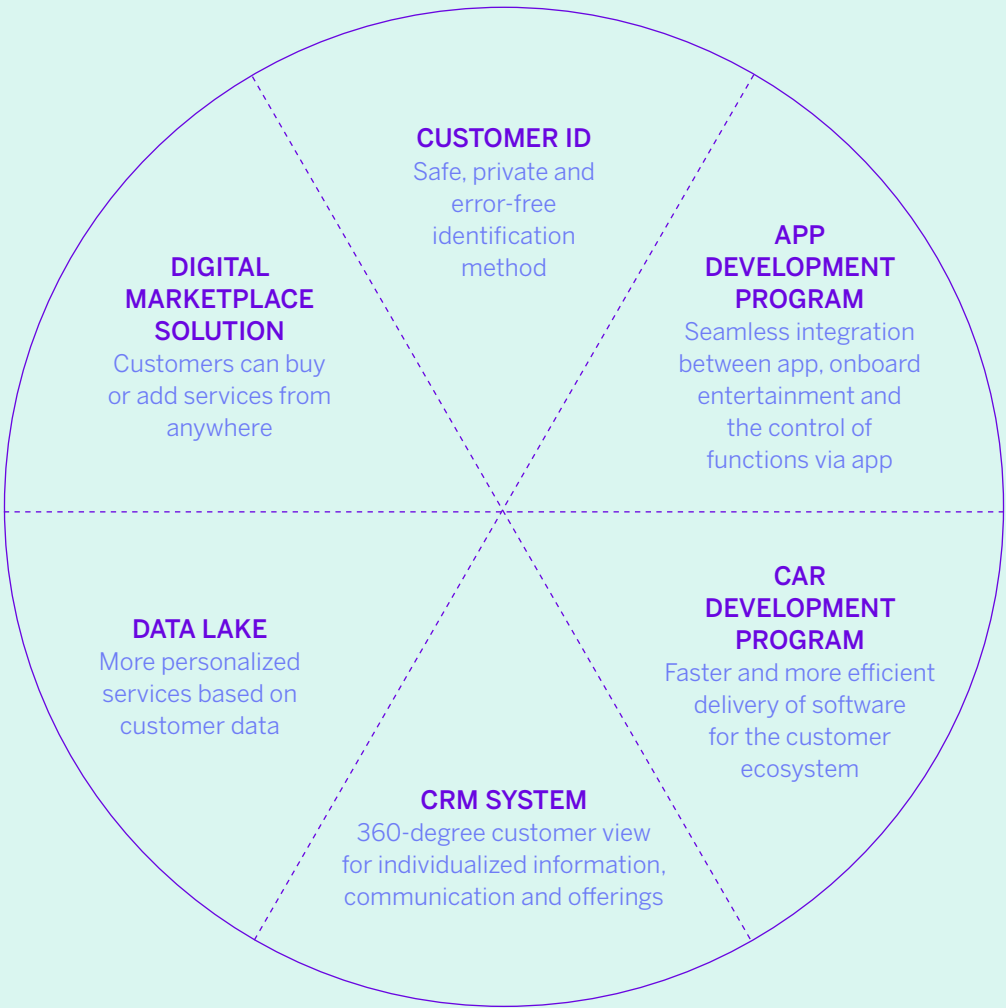
What’s the difference between a collection of products and services and a customer ecosystem? A general store gives you access to all sorts of products—so why isn’t that an ecosystem? An ecosystem does more than just present a portfolio. It connects all products and services, links them to one customer and creates a seamless experience across a wide range of life areas. This can only be made a reality with the right data and technology.

The way you use data and technology determines your customers’ experience. If logging in is a hassle, then every single application is a hassle as well. If the data generated isn’t integrated with your CRM, your ability to optimize and personalize is cut off at the knees.

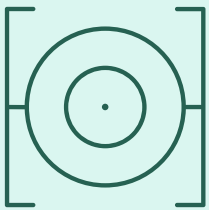
Finally, underlying everything is your data platform. A data platform is what turns data from a cost into an opportunity. During any end-to-end customer journey, countless data points will be collected and stored in a data lake. Your data platform is what organizes and analyzes that data, giving you the insights and foresight you need to plan for the future.

The importance of data cannot be overstated. Data is what connects your ecosystem and gives your customers the seamless feel they rate so highly. Data management makes it fully functional and a joy to engage with. It connects the ecosystem with the rest of your company. Data makes the ecosystem unmistakably yours.

SIX ENABLERS TO DESIGN A CONVENIENT, CONSISTENT ECOSYSTEM EXPERIENCE



We close with some key takeaways:



Strategy and scope

Have you defined your vision around the customer?

→ BE CUSTOMER-CENTRIC

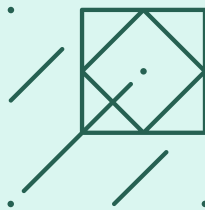
Put your customer at the center of everything you do, from strategy to execution and onward.

→ STAY FLEXIBLE

Understand your data and react quickly.

→ MEASURE EFFECTIVELY

Track ecosystem performance to steer partners and gain relevant insights.



Partnerships and operating model

Have you selected partners and aligned your organization?

→ COLLABORATE WISELY

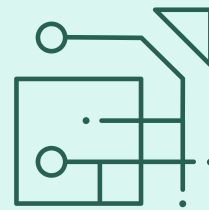
Choose partnerships that balance your strengths and gaps, while adding value to your customers.

→ BE ON THE SAME PAGE

Define organizational roles and responsibilities clearly.

→ DRIVE BUSINESS VALUE

Measure profitability holistically instead of judging ROI on each part of the ecosystem.



Technology and data

Have you decided how insights will drive action?

→ DATA, DATA, DATA

Be data-driven to monitor performance, leverage insights and find opportunities.

→ DESIGN FOR EASY INTEGRATION

Ensure that all systems of all partners are aligned.

→ BUILD FOR SCALABILITY

Be ready for new markets, models and services, as well as ongoing maintenance and optimization.

Two weeks later, the Mullers are wrapping up the perfect vacation. Their car's battery is low, but no one is concerned. Shielded from worry, they've spent time on what matters most. And there's still one more treat ahead of them.



Their in-car system has selected a charging station attached to a restaurant and entertainment center—all functions that are part of the Mullers' ecosystem. And after two weeks on the road, their rewards account is bursting with points.

At the door, a waiter greets the family by name, while an attendant takes the car to be charged. The parents are seated at an indoor balcony overlooking a spectacular play area. The kids are ecstatically pelting their rivals with cannonades of foam. The parents' eyes grow wide when their personalized meals arrive. Along the trip, they'd all been making their preferences available. Now they've chosen to let this restaurant surprise them and they're glad they did. While they eat, they

decide to join a casual game with the other adults in their seating area.

An attendant unplugs the car and parks it on the side to wait. This holiday isn't over yet.

Customers have spoken, in words and actions. In every industry where they've been built, customer ecosystems have acted as magnets, pulling customers from lone, isolated services into the convenience of connected spaces. The automotive industry is beginning to close the gap. Soon, automotive customers will face a choice: Will they pick a simple car that gets them from A to B or will they choose to become part of a new world?

Your customers are ready. Are you?

Connected customer ecosystems are here.

Automotive leaders are facing unprecedented opportunity—new ways to reach consumers, engage with them and fulfill needs that transcend mobility.

At frog, we have a vision for automotive and mobility that combines business strategy with human-centered design, harnessing the latest technologies to take your customers further. We believe that personalization is best achieved through insight and enabled by innovative solutions that set you apart from competitors.

Our customer ecosystem offer

Our team supports you end-to-end through **strategy and scope, partnership and operating models** and **technology and data**, helping you engineer a customer ecosystem that puts your customers' needs first.

Reach out to our team and let's start building.

frog can help you:

- Find out what your customers want, and what they'll pay for
- Define a successful ecosystem strategy and target operating model
- Weigh your company-specific requirements
- Understand your role: creator, orchestrator or collaborator
- Build a sustainable ecosystem with the right partner play
- Measure ecosystem performance and success
- Design and develop next-generation products and services
- Shape the future of automotive

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