

HARVARD | BUSINESS | SCHOOL



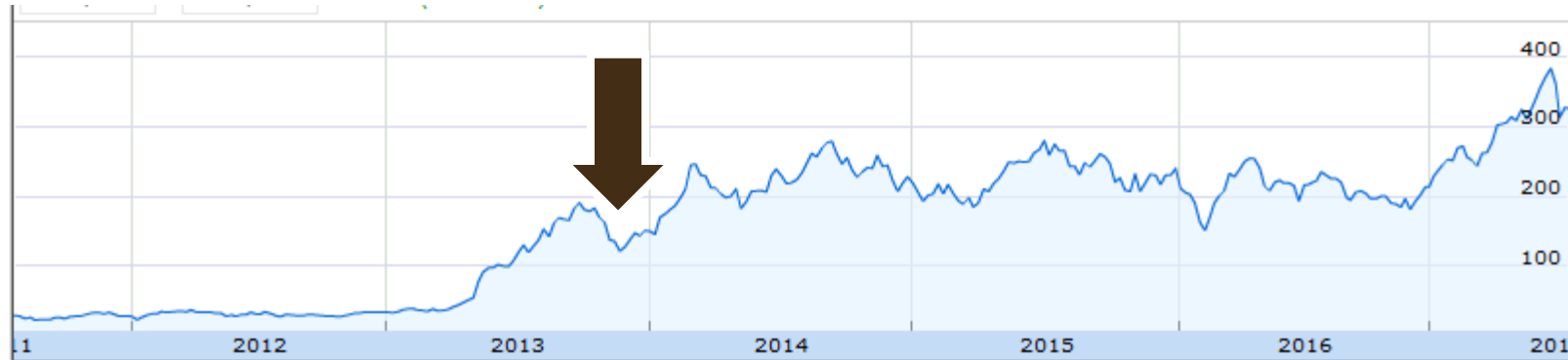
UMA RECEITA PARA DISRUPÇÃO DIGITAL NO MUNDO HIPER-CONECTADO

Thales Teixeira (@ThalesHBS)

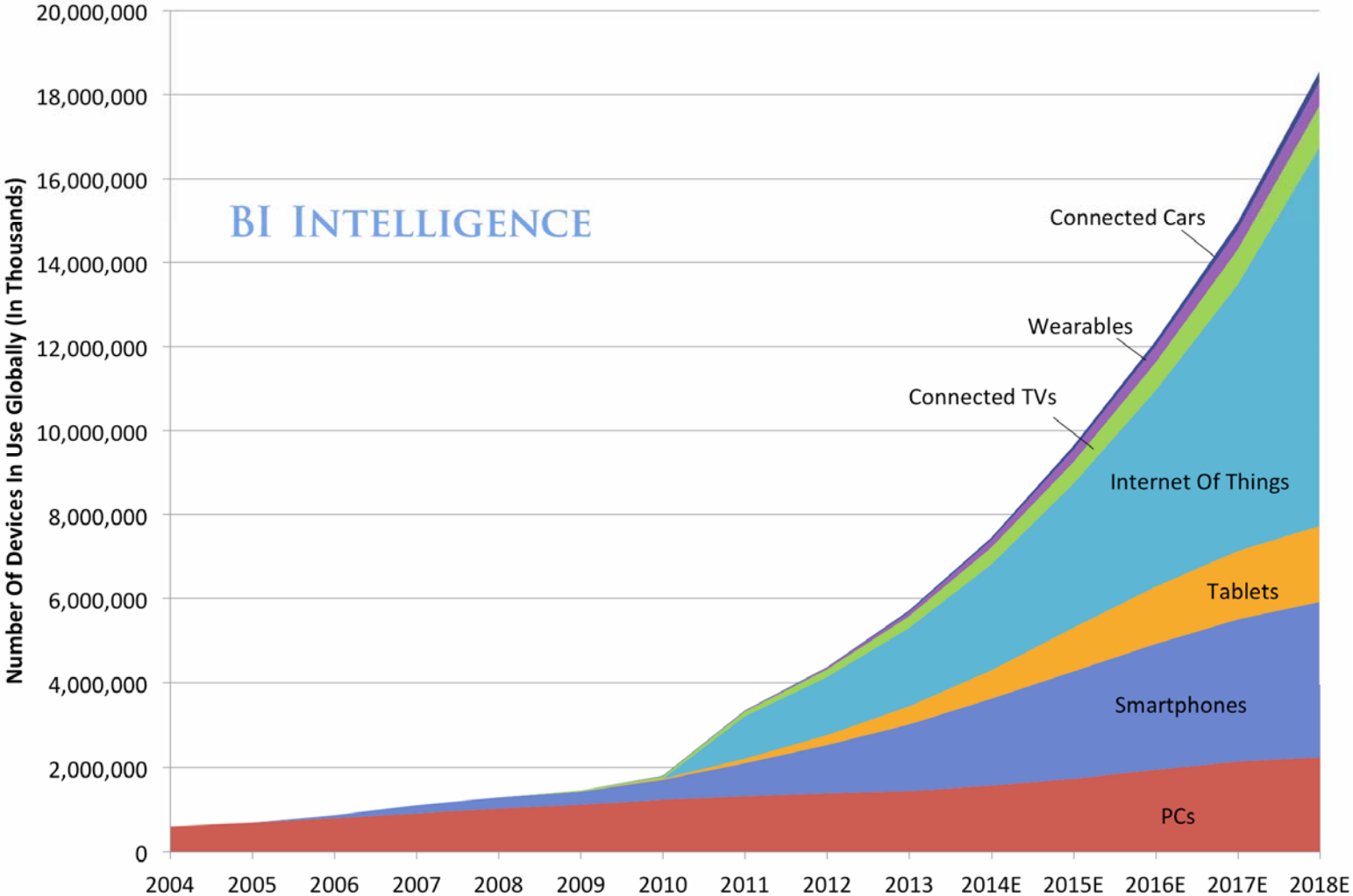
Caso da Tesla



Solução e impacto no mercado



Todos e tudo conectado

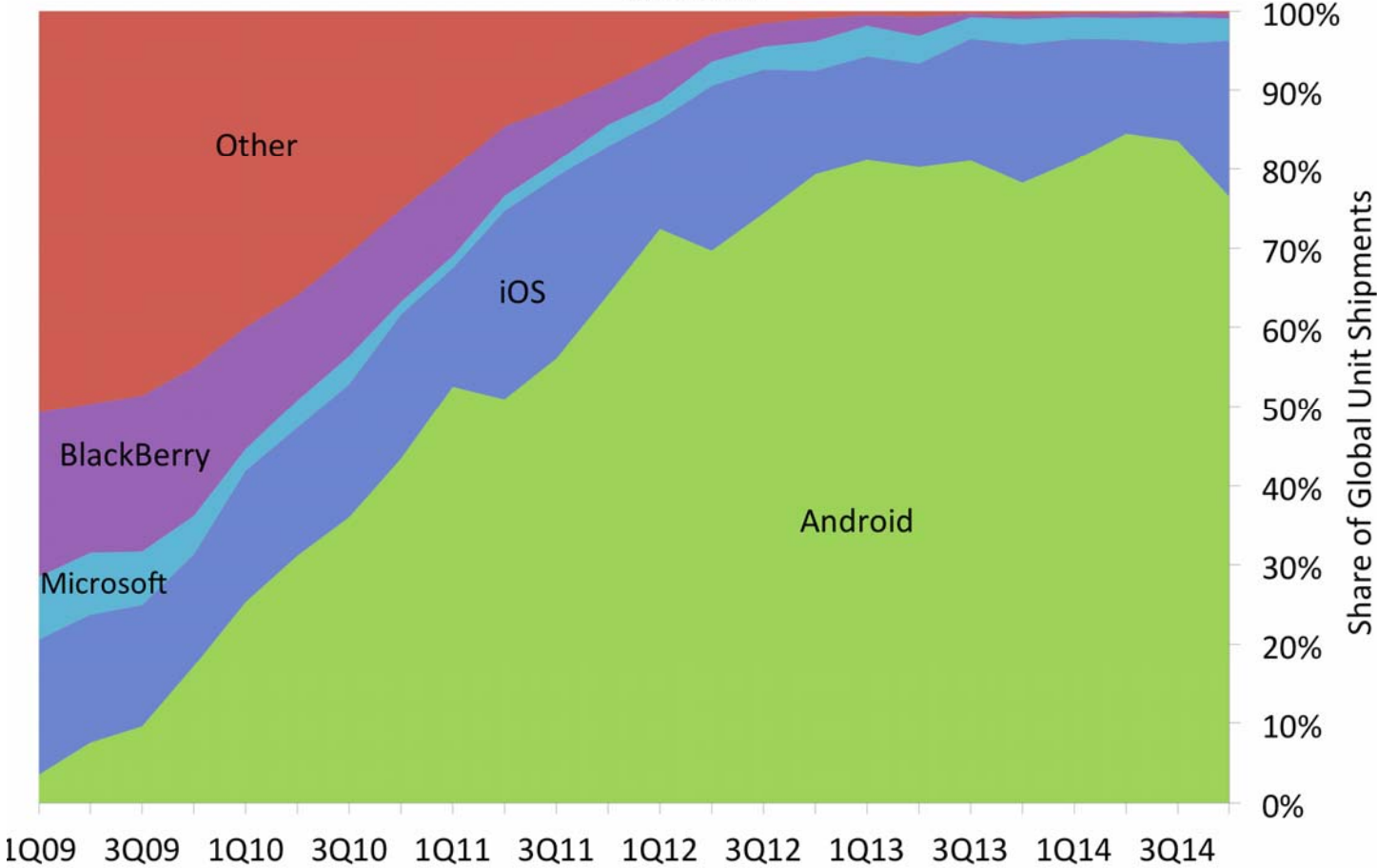


BI INTELLIGENCE

Software para conexão de graça

Global Smartphone Shipments Market Share

By Platform



Hardware padronizado e copiável

Build Your Own Wi-Fi Connected Thermostat



Thorin Klosowski
1/17/14 5:30pm • Filed to: DIY

59.9K 15



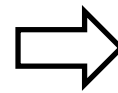
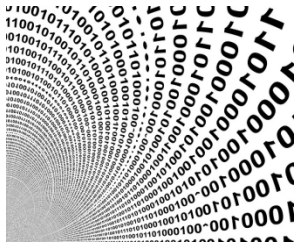


Como ganhar dinheiro em uma economia hiper-conectada?

Ondas de disrupção digital

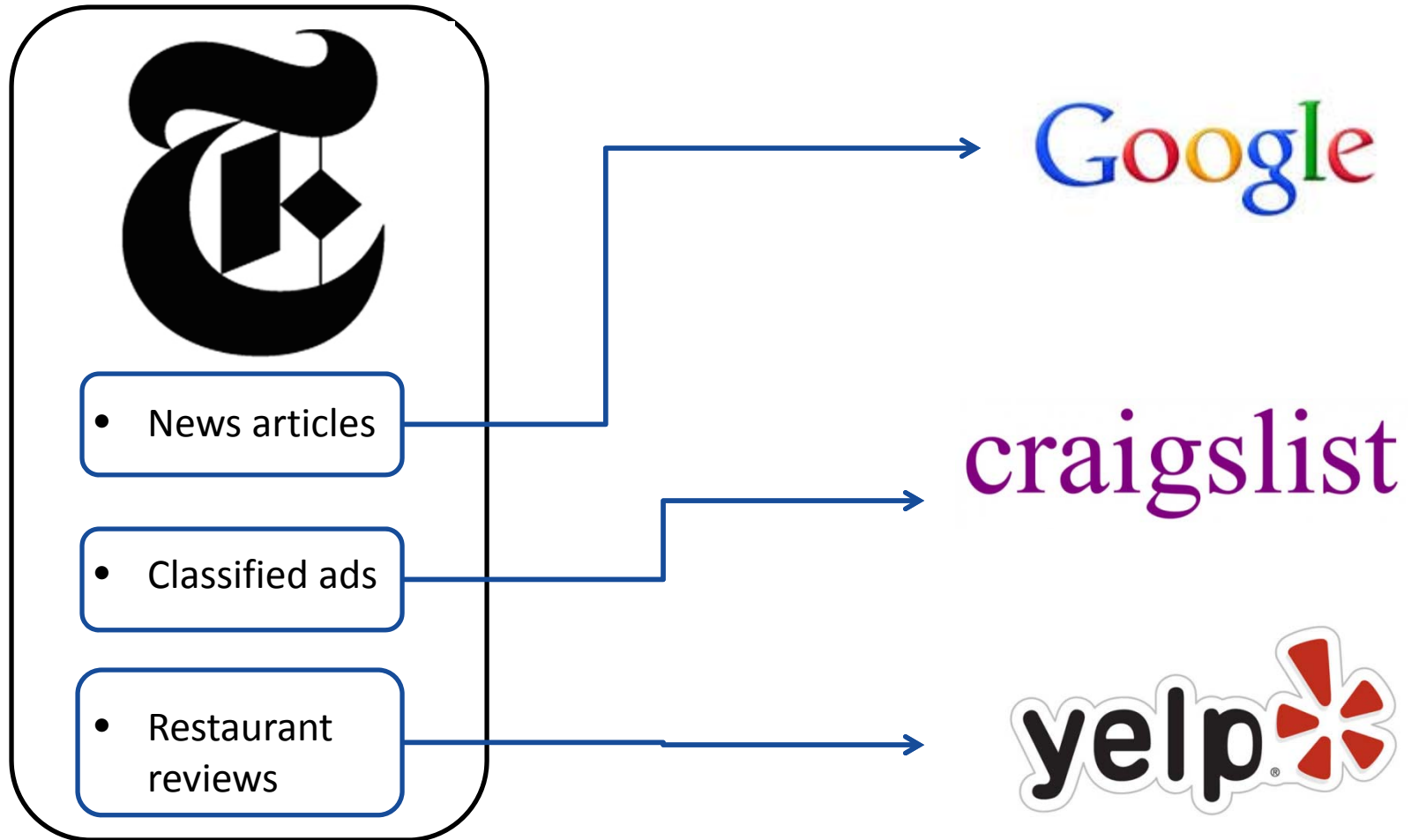
Ondas de disrupção digital

1st wave

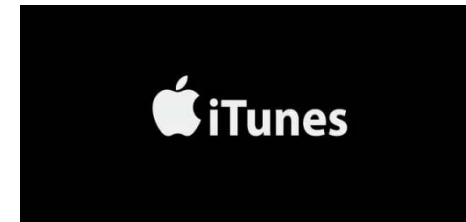


Media, content, etc.

Unbundling: A 1ª onda de disrupção digital

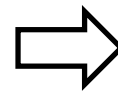
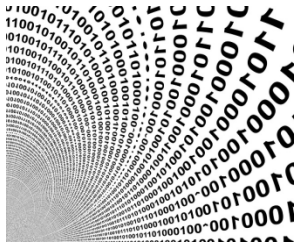


Unbundling tudo



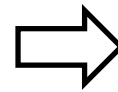
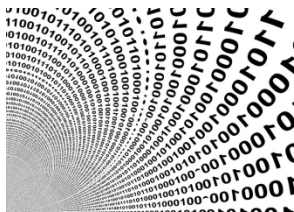
Ondas de disrupção digital

1st wave: Unbundling



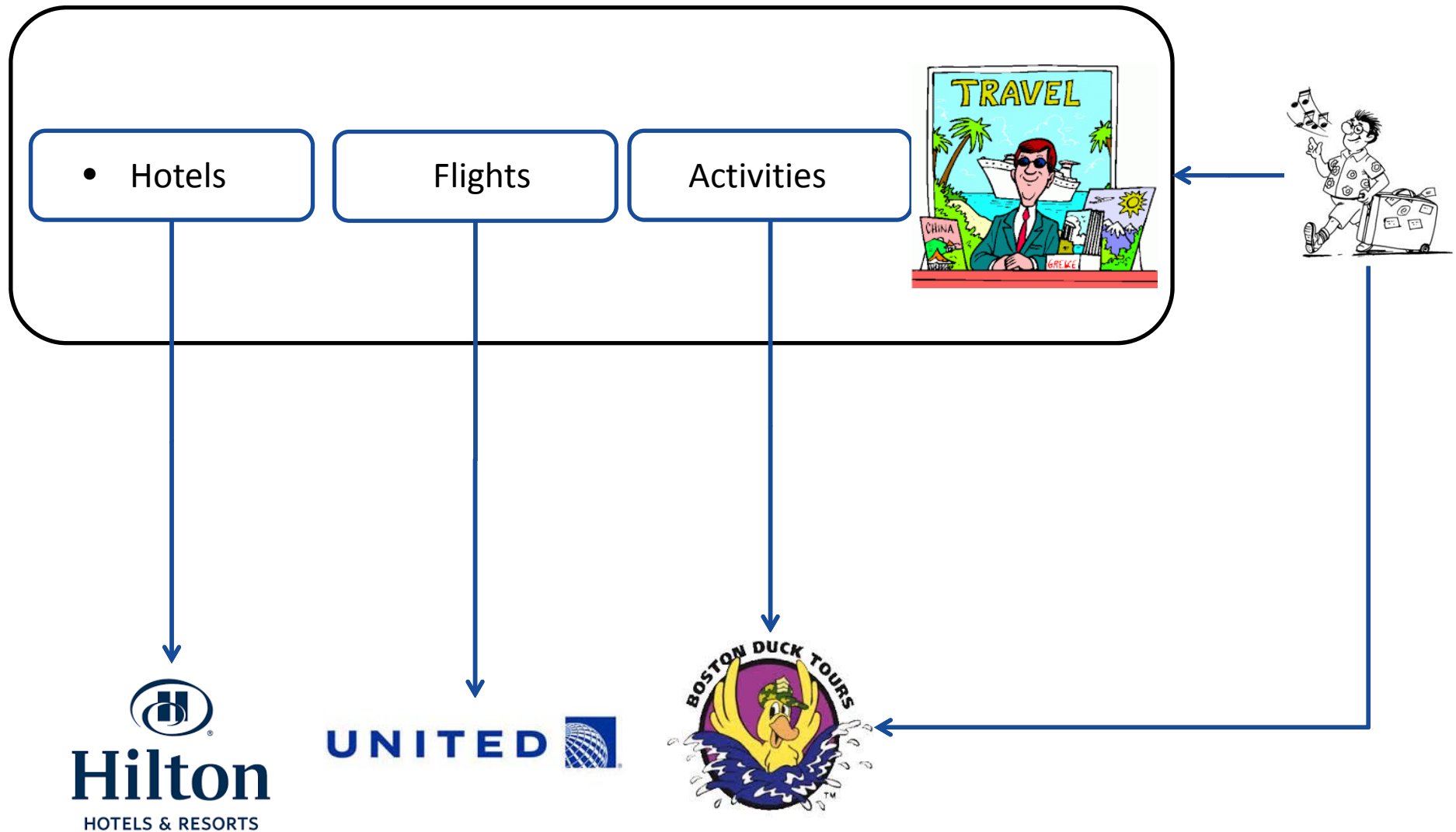
Media, content, etc.

2nd wave



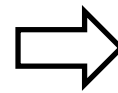
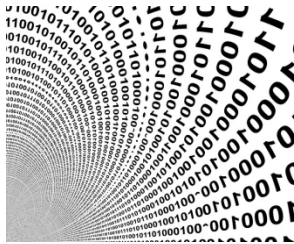
Travel, financial services, etc.

Desintermediação: A 2ª onda da disrupção digital



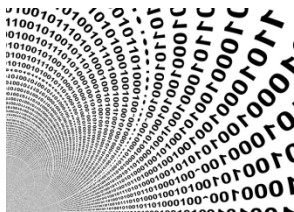
Ondas de disrupção digital

1st wave: Unbundling

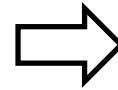


Media, content, etc.

2nd wave: Disintermediation

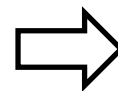


+



Travel, financial services, etc.

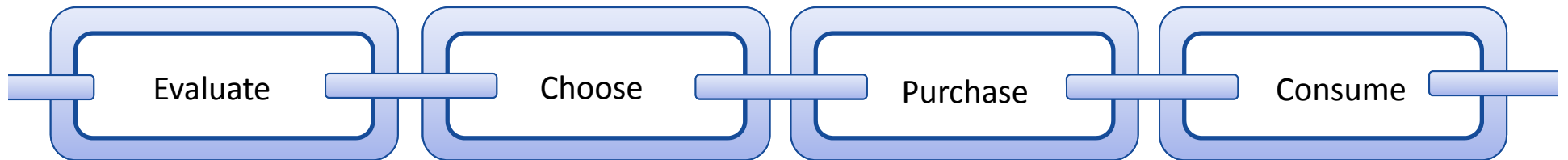
3rd wave



Electronics, consumer goods, transportation, etc.

A 3ª onda

The consumer's value chain



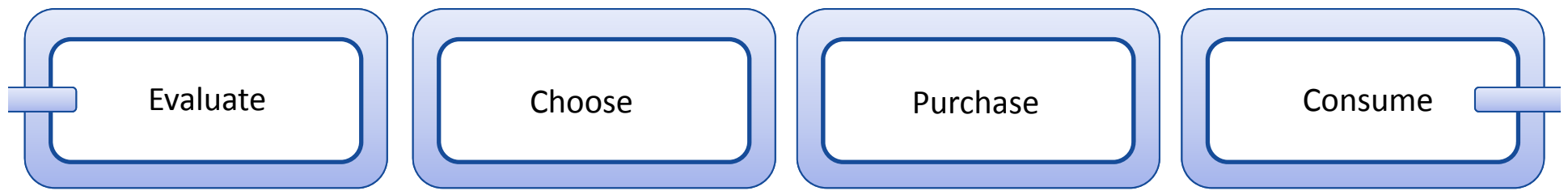
Best Buy 

SEPHORA



O que é decoupling

The Decoupled value chain



BIRCHBOX ♦

*Sampling, purchase
somewhere else*

amazon.com

*Choose somewhere,
buy here*

zynga

*Consume without
purchase*

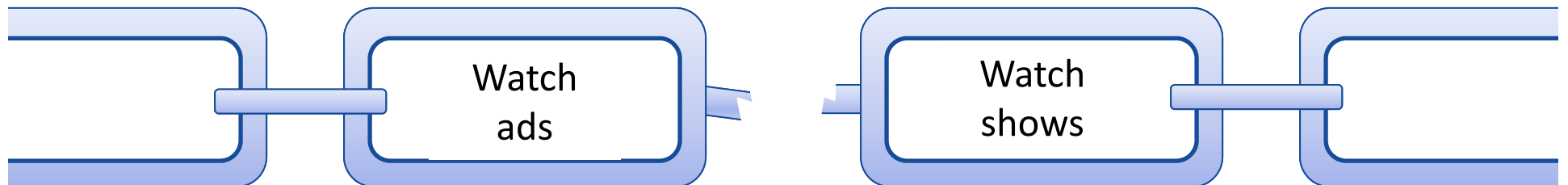
“Decoupling” é a quebra dos elos existentes entre atividades de valor do consumidor que eram tradicionalmente oferecidas em conjunto.



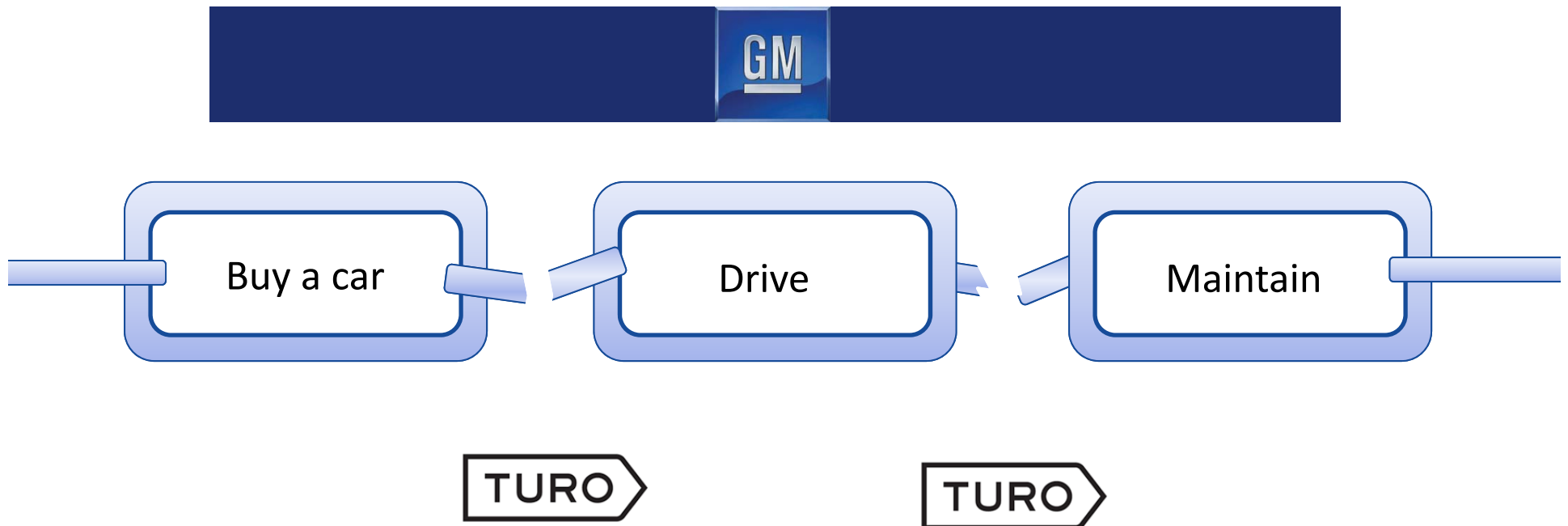
Existe alguma receita para destruir
modelos de negócios antiquados e
recombinar as peças para **criar**
novos modelos?

Exemplos de decoupling

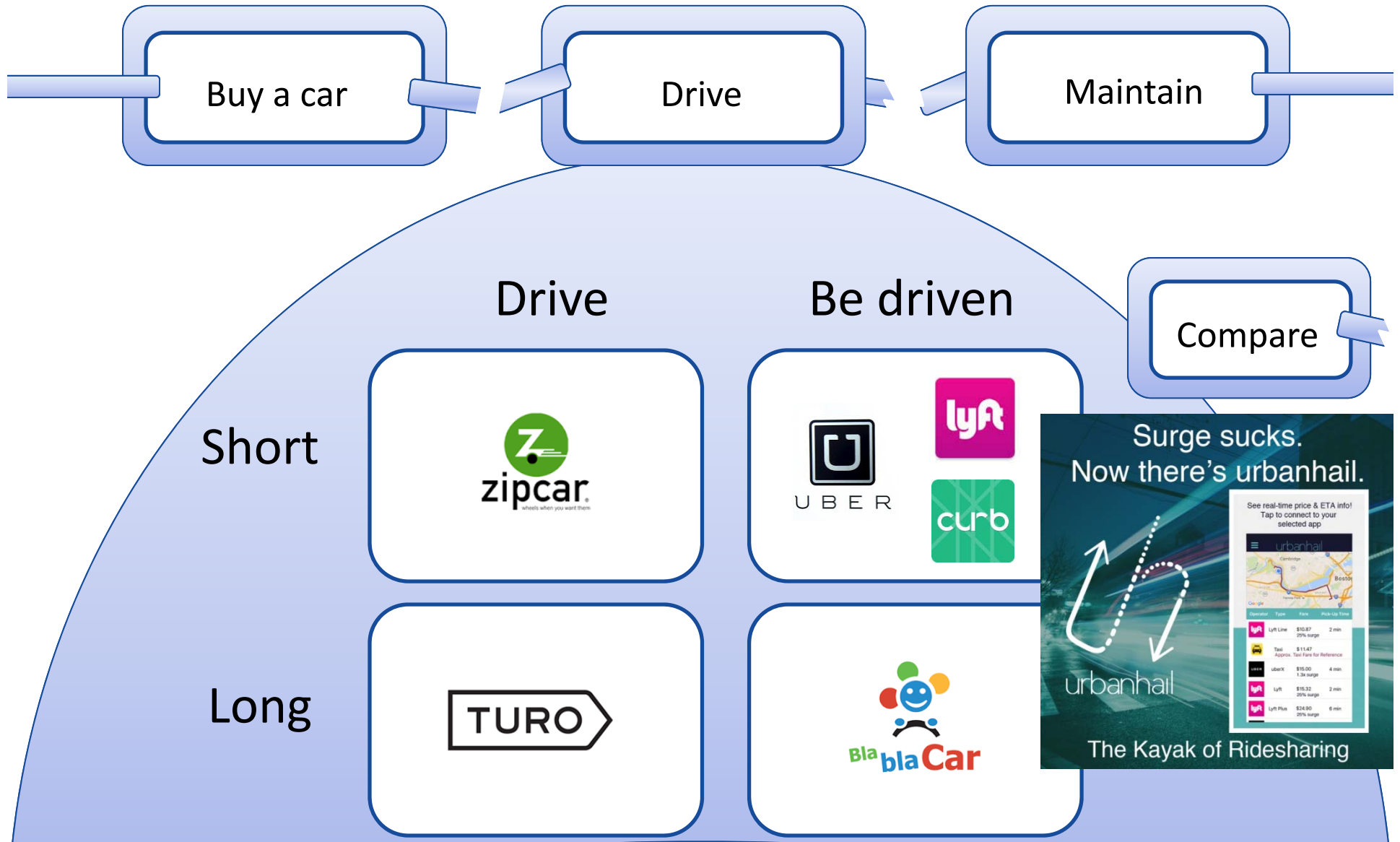
Decoupling na Prática: TV Aberta



Decoupling na Prática: Automóveis



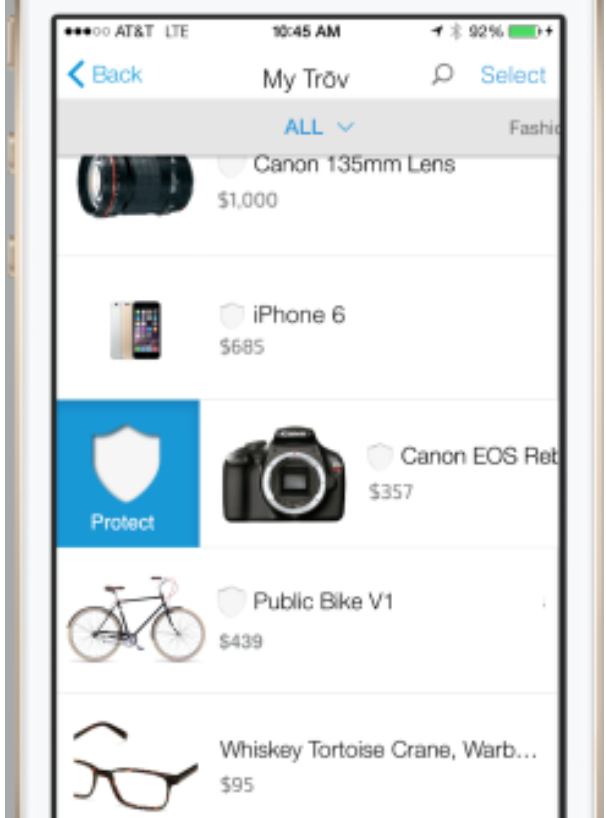
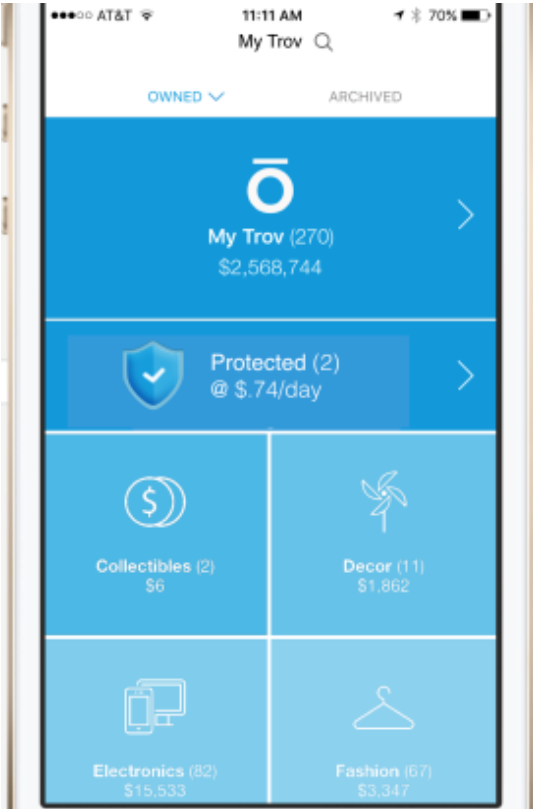
Segmentação em disrupção automobilística



Decoupling em seguros



+



Os Três Tipos de Decoupling

Estudo de Caso: Ouvir radio

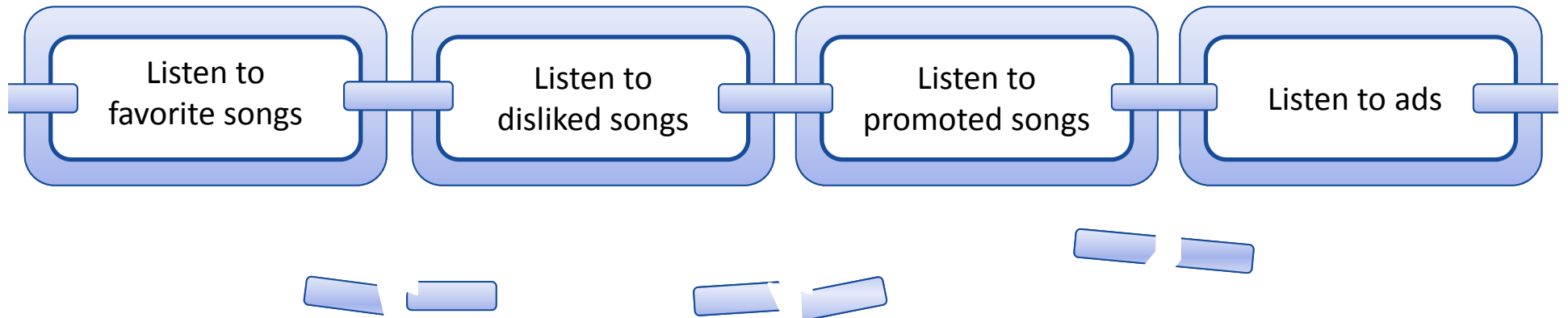


Creates Value

Erodes Value

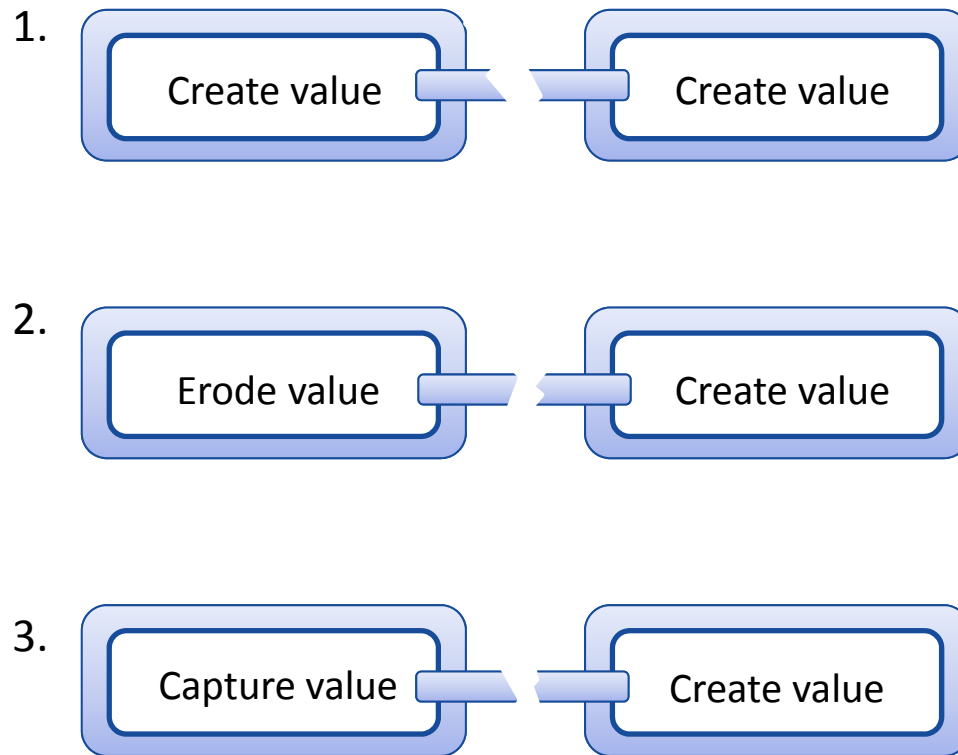
Captures Value

Captures Value



Os Três Tipos de Decoupling

Activity Types



Example



60 M

{Play game} + {View game}



125M

{Visit store} + {Play game}



{Buy game} + {Play game}

Decouplers de Atividades de Criação de Valor



\$900M acquisition



\$900M acquisition



\$19B acquisition



\$8.5B acquisition

Decouplers de Atividades de Destruição de Valor



DOLLAR SHAVE CLUB
SHAVE TIME. SHAVE MONEY.

\$615M valuation



Est. \$1B valuation

freshdirect

+\$480M valuation

RENTHERUNWAY
love. wear. return.

\$400M valuation

Decouplers de Atividades de Captação de Valor



\$2.7B market cap

BIRCHBOX♦[®]

\$485M valuation



\$9.6B valuation in new round

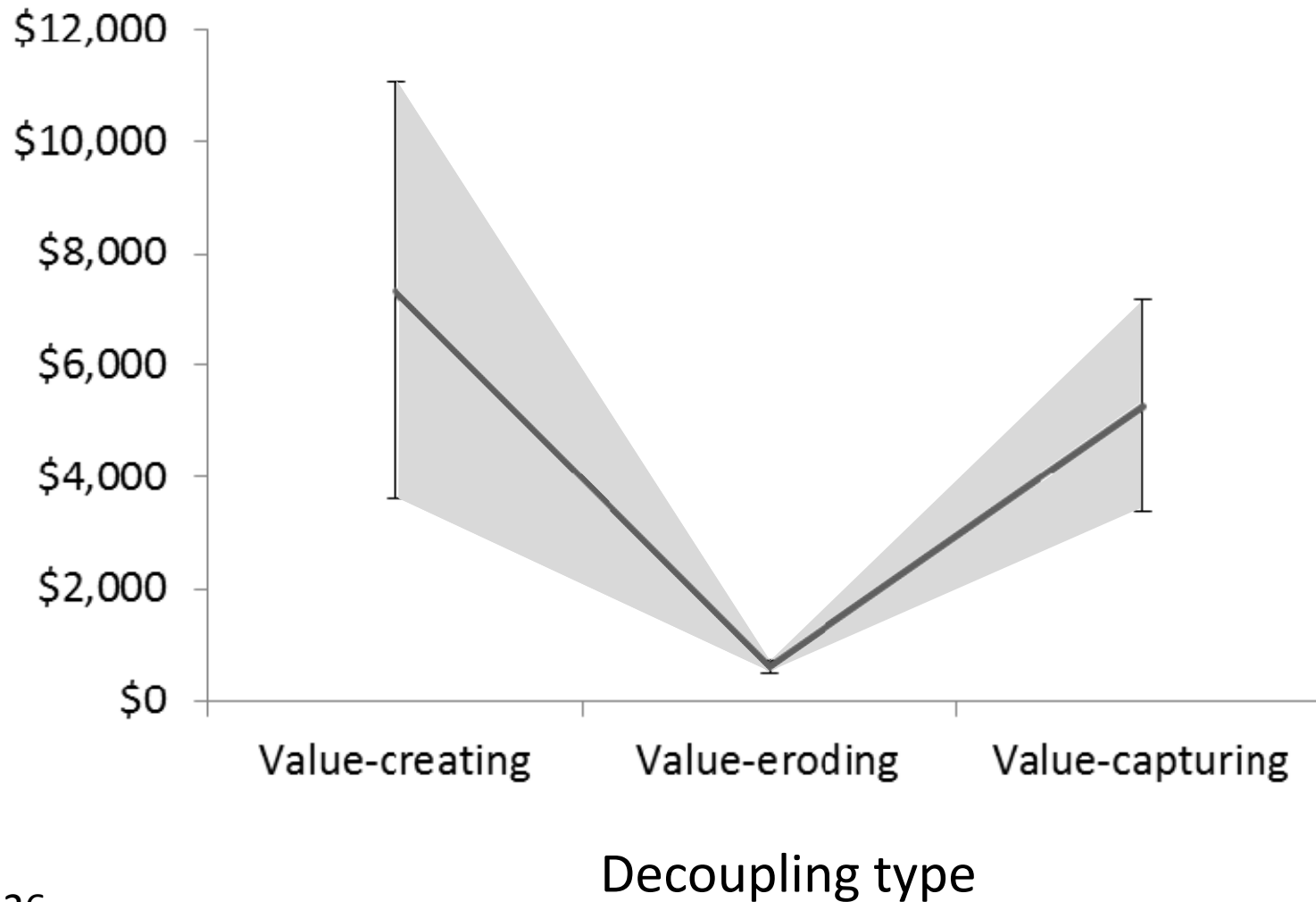


Spotify[®]

Est. \$8.3B valuation

Valor de mercado por tipo de decoupling

Market value
(in Millions)



N = 26

Independente da indústria ou setor, existem apenas **três tipos** de decoupling e o mercado tende a avaliá-los com **valores diferentes**.

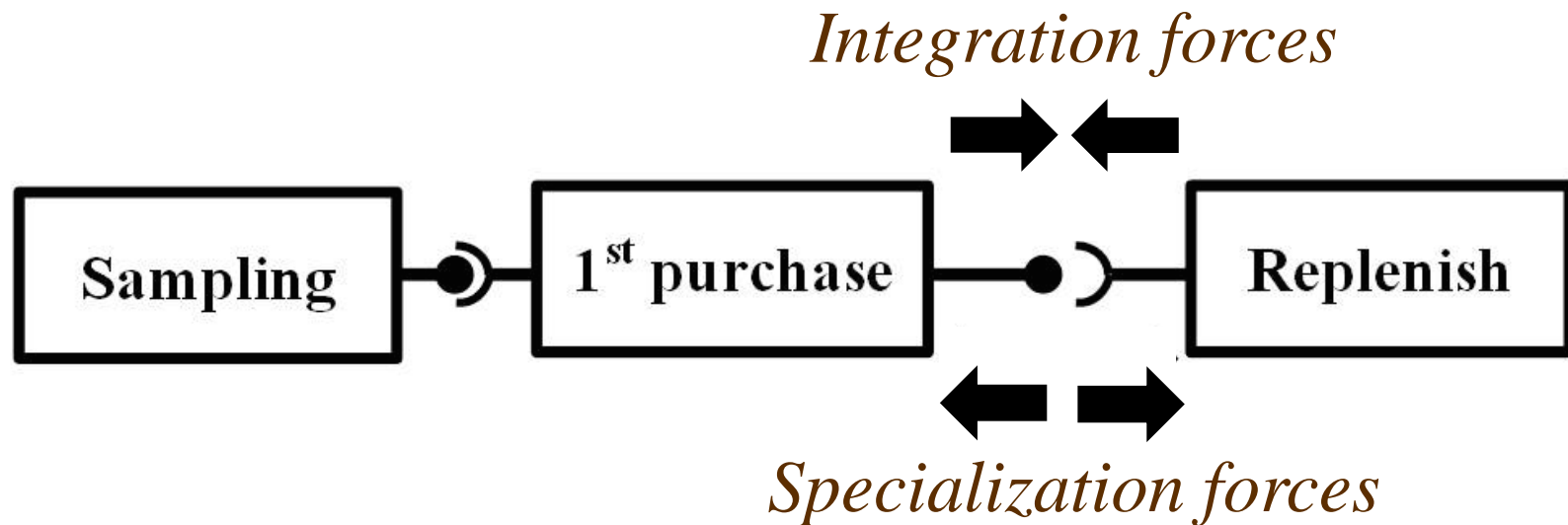
O consumidor fanático por decoupling



Drivers de decoupling

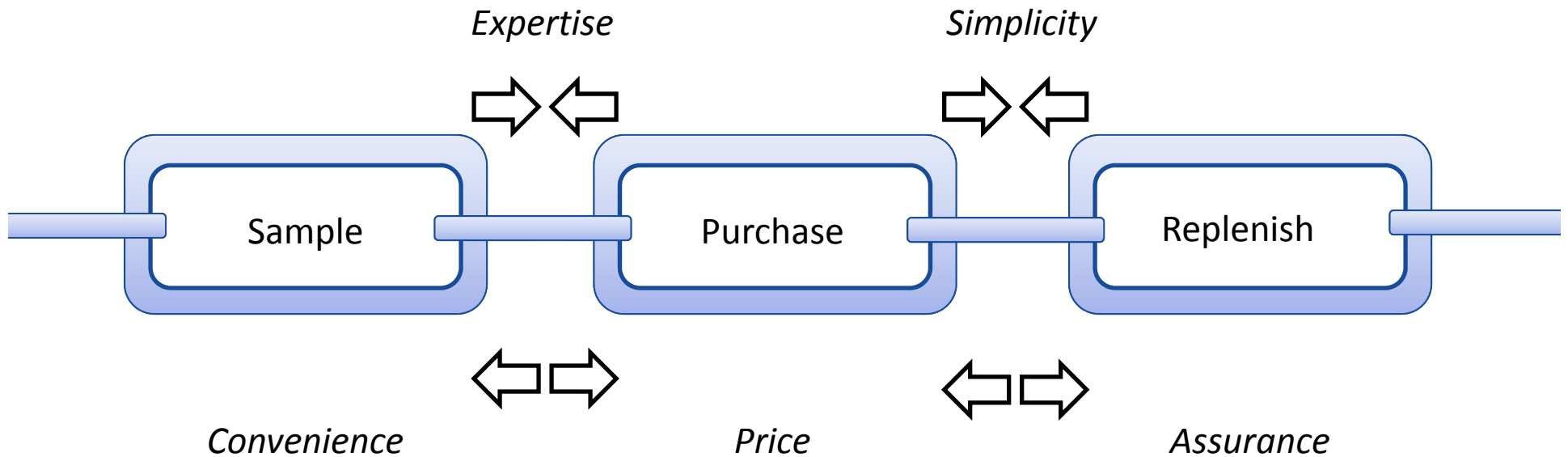
Quando o decoupling ocorre?

In the beauty products industry:



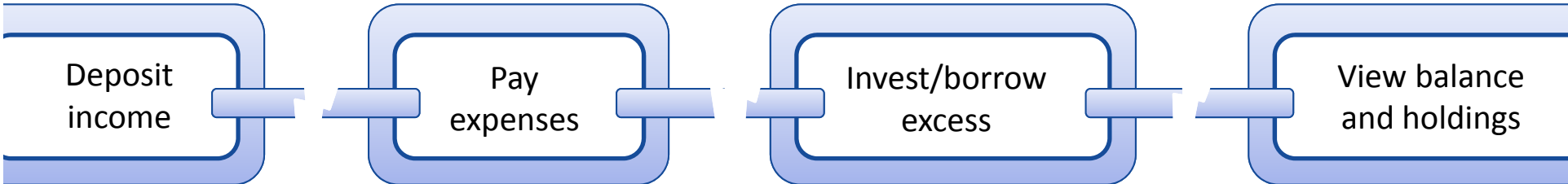
Integração versus Especialização

SEPHORA



Forças de decoupling no setor bancário

Bank of America



Easier to pay online

Lower spread bet. lend & borrow

Faster visibility into multiple accounts

Park money (regulated)

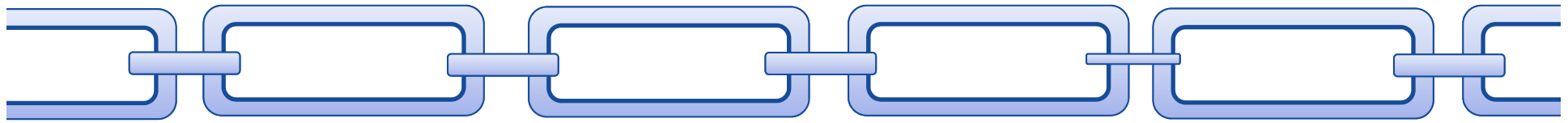
Manage money (unregulated)

Reduções de custo em cada fase—monetários, de tempo e esforços—afetam as forças de especialização e determinam se o consumidor irá desacoplar ou não.

Disrupção com decoupling

A 'Receita' de Decoupling

1 Identify the customer's value chain



2 Identify the type

Create value

Erode value

Capture value

3 Find the weak link

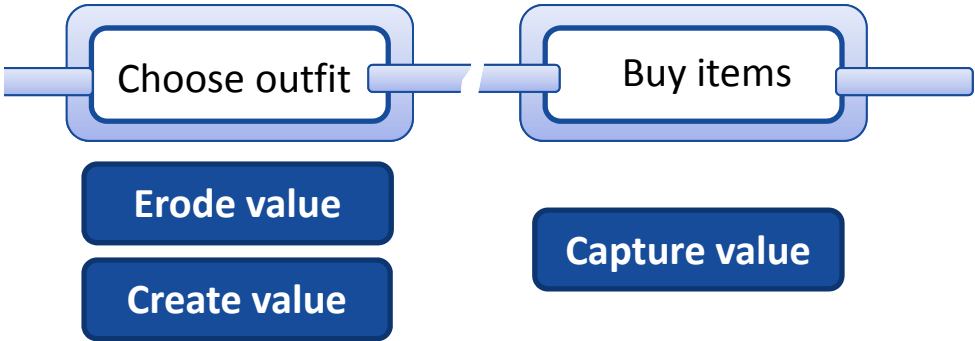
4 Increase the force for specialization



5 Anticipate competitive response

*Reduce the monetary,
time or effort costs*

Decoupling na indústria de moda



\$28 Bi in sales



Lower cost to put together an outfit



KEATONROW

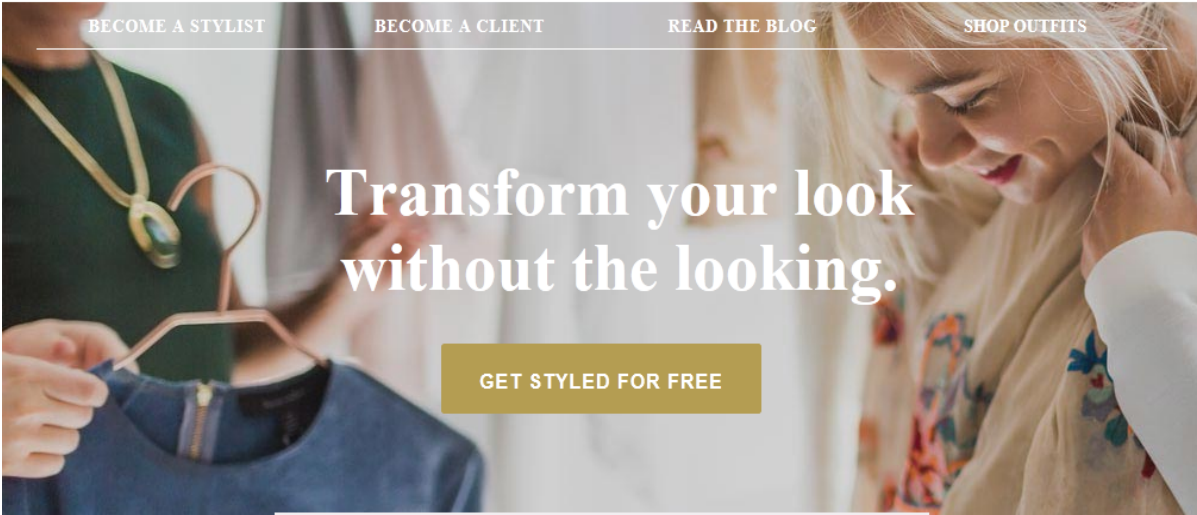
LOG IN
Shopping bag (0) | Checkout

BECOME A STYLIST

BECOME A CLIENT

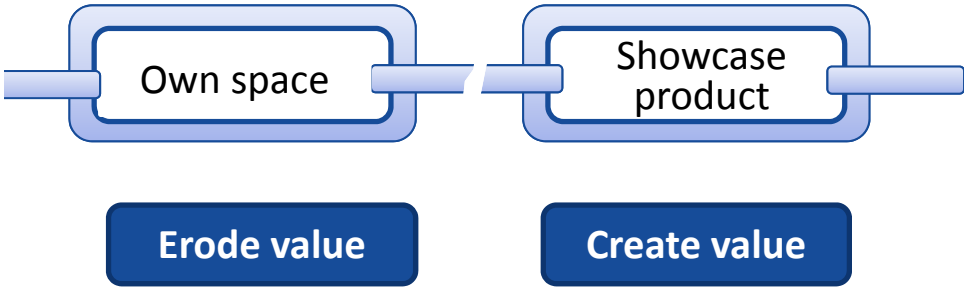
READ THE BLOG

SHOP OUTFITS



HOW IT works

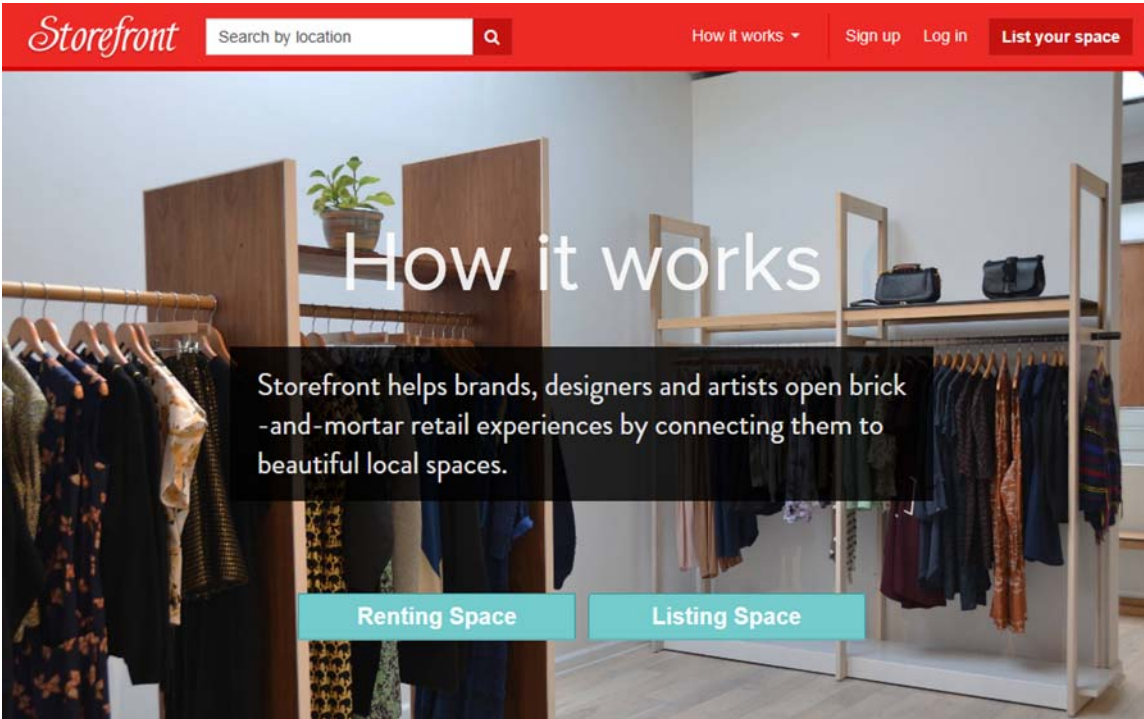
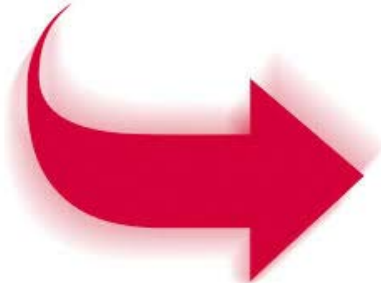
Decoupling no Setor Imobiliário Comercial



480 million sq. ft of commercial real estate



Lower cost to sell (display) products



Realizar disrupção via decoupling envolve **uma receita com 5 passos**, a qual pode ser utilizada em qualquer indústria.

Como as empresas estabelecidas estão respondendo?

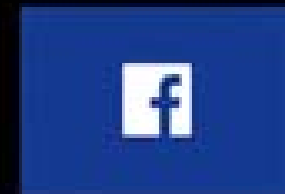
Case: Netflix vs. Comcast

xfinity | x1

Featured Apps



PANDORA

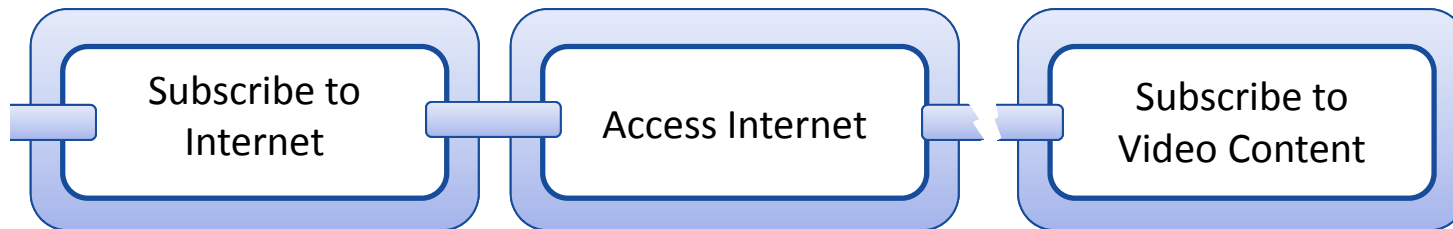


YouTube

INTERNET

Netflix vs. Comcast

comcast.



NETFLIX

Comcast: *Netflix, you should pay us as we are the suppliers to your business.*

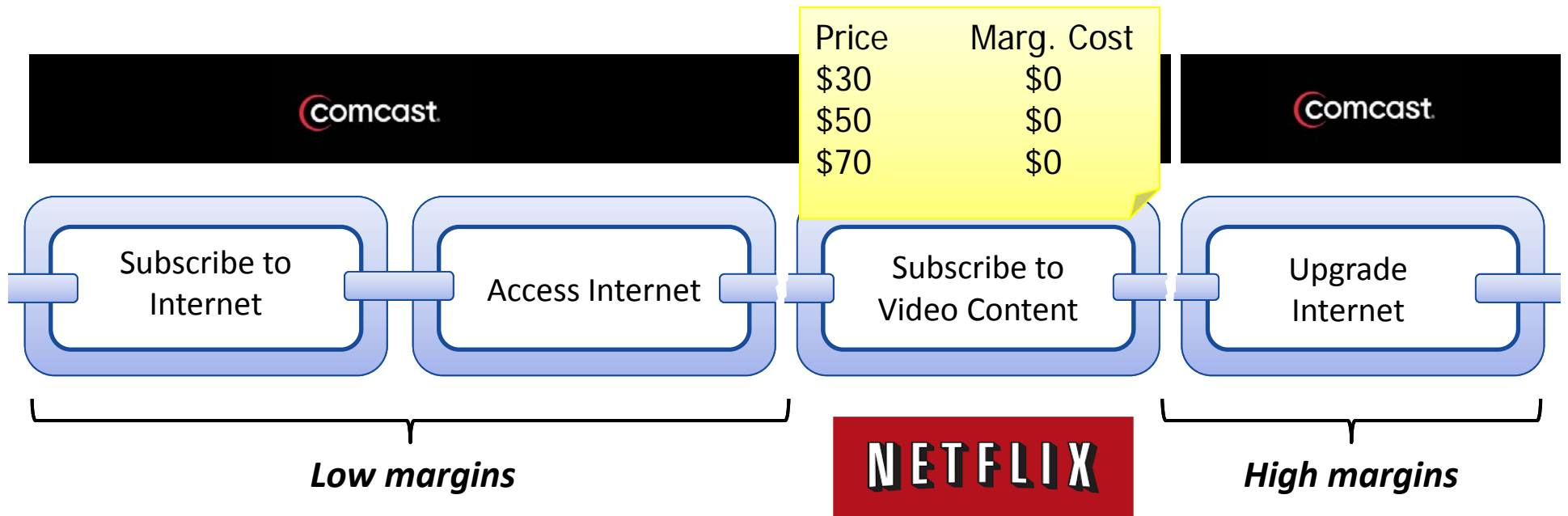
Netflix vs. Comcast

NETFLIX



comcast

Netflix vs. Comcast



Comcast: Netflix, you should pay us as we are the suppliers to your business.

Netflix: Actually, Comcast, you should pay us because the only reason people are upgrading to your faster internet is because of us.

Netflix vs. Comcast

NETFLIX



Comcast

Netflix vs. Comcast

Netflix

Comcast

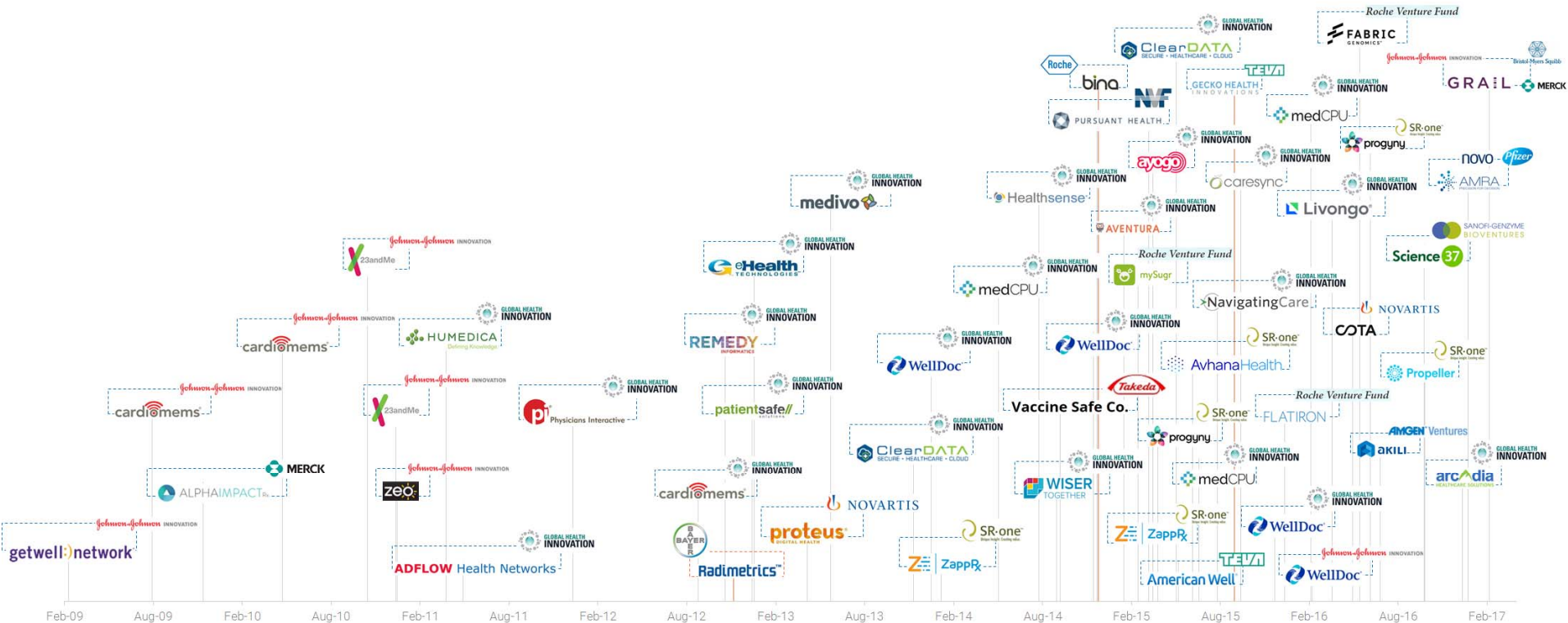
high margins

Comcast: Netflix, you should pay us as we are the suppliers to your business.

Netflix: Actually, Comcast, you should pay us because the only reason people are upgrading to your faster internet is because of us.

Comcast: Lets agree that no one pays anyone.

Um mar de disruptores...



DATE OF INVESTMENT

...afetando industrias de um modo similar.



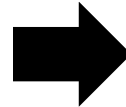
Empresas estabelecidas não
estão sabendo responder a
esta **nova onda** de disrupção
digital.

Três mitos

Origem da disrupção

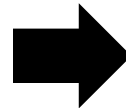
Changing consumer behavior

Try in-store + buy online



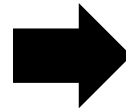
amazon.com[®]

View game without playing game



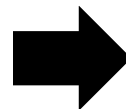
twitch

Use vacation rental without buying it



airbnb

Sample beauty product + Purchase elsewhere



BIRCHBOX[♦]

1 Consumidores
'disrompem'
mercados,
NÃO as startups.

Tantas tecnologias inovadoras

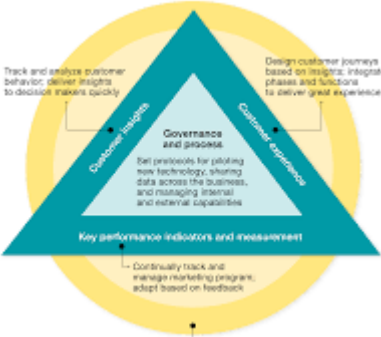
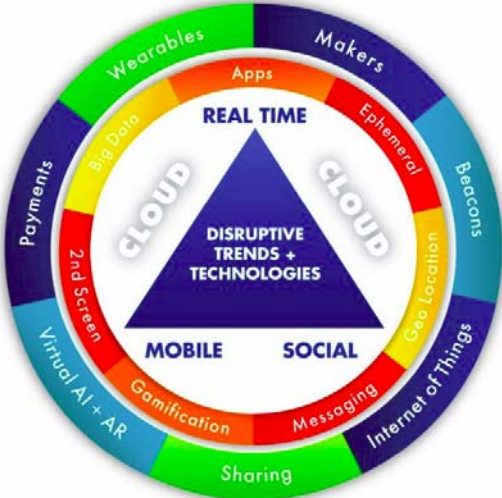
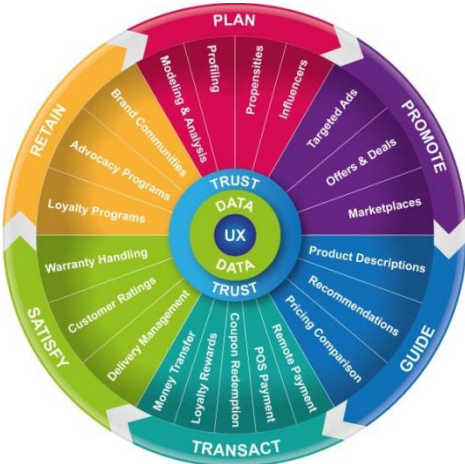




② O ingrediente disruptivo tende a ser modelos de negócios inovadores, não apenas tecnologia.

Professores, consultores, gurus têm a resposta!

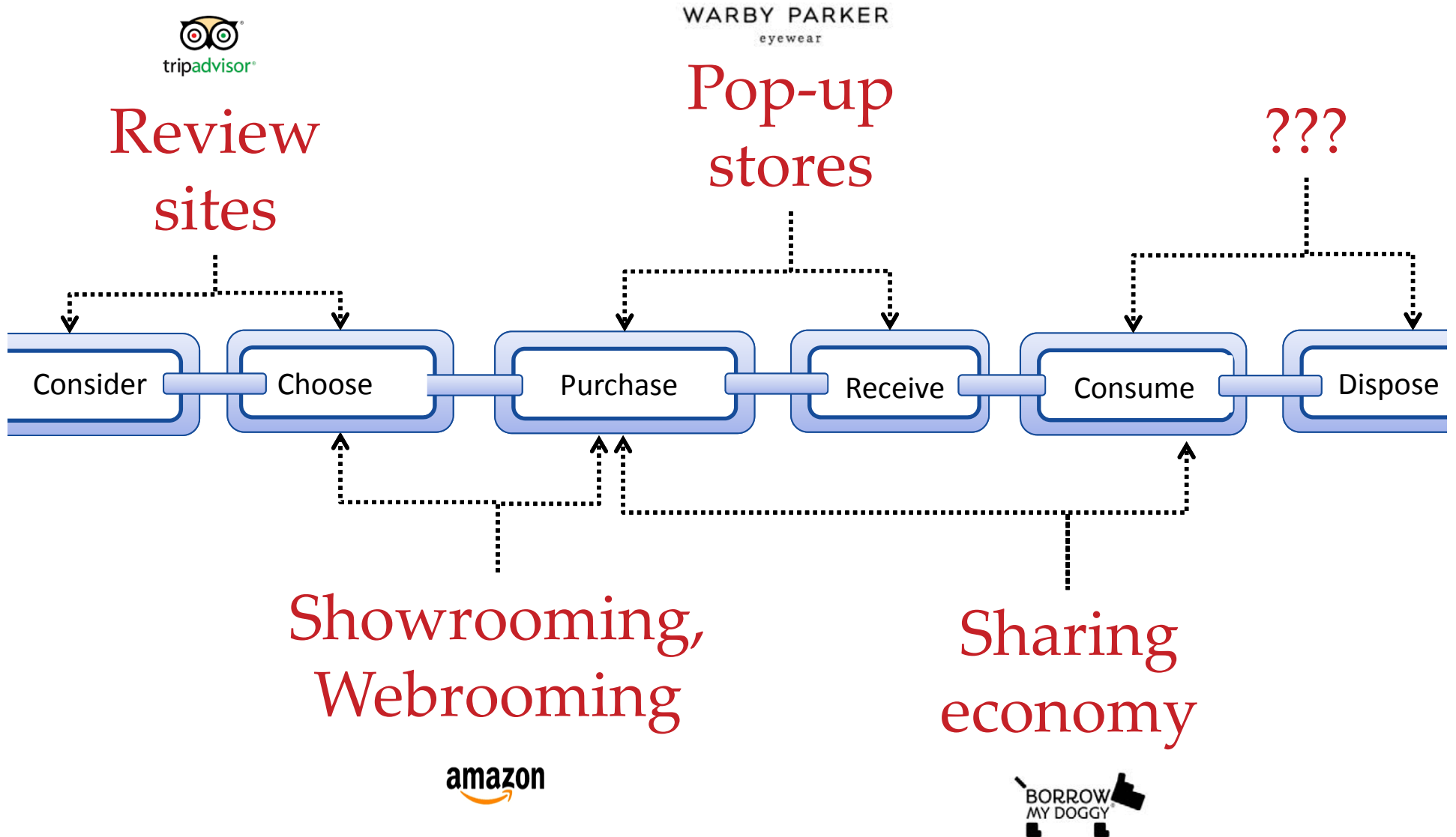
WHEEL OF DISRUPTION



Note: these are actual frameworks.

3 Existe uma abordagem em comum para disrupção digital.

No fim... e' tudo decoupling



Ache as oportunidades, antes que outros achem!





Thales S. Teixeira

Para mais, siga [@ThalesHBS](#)