motormindz’ Integrated Connectivity Ecosystem Maturity Model

STAGE 1: CONNECTIVITY AS A FEATURE

- Bolt-on a telematics unit to the vehicle. Enable limited connectivity to vehicle subsystems. Enable limited customer-facing services, like safety and security, concierge, roadside assistance, and a consumer app.
- Most OEMs just got here.
- Many are following a basic service set that was established by OnStar and is also offered by SiriusXM Connected Vehicle Services for many OEMs.
- Most OEMs are at this stage, moving to install telematics in all new vehicles, but still treating it as a separate feature, not fully integrated into the design of the vehicle.
- Organizationally, many OEMs operate telematics or connectivity as a separate business unit or profit center, focused on revenue generated from customer-facing services and 3rd party data partnerships.

STAGE 2: DESIGNING FOR CONNECTIVITY

- Make the telematics unit an integral part of the design of the vehicle.
- TCU has full read/write access to all vehicle modules.
- OTA updates can be efficiently delivered to all vehicle modules.
- New data extracts and queries can be easily formulated.
- Business processes in place to quickly enable activation of new internal/external connections.
- New entrants like Tesla and Rivian were designed for connectivity from the beginning.
- Traditional OEM’s are beginning to follow. Ford’s Mach-E is one example.
- Organizationally, the task for building-in connectivity falls to Engineering and IT at this stage, but needs to be guided by a clear vision for making Connectivity a core competency for the company.

STAGE 3: CONNECTIVITY AS A COMPETENCY

- The business is run with an assumption of connectivity to all vehicles and users.
- It becomes unacceptable for a vehicle to be delivered without a connection. Contrast that with today’s performance. For some OEM’s activation of telematics at delivery of a new vehicle often falls below 50%, and reactivation of used vehicles falls still lower.
- Senior leadership is assigned to lead the Connectivity function and is tasked with using it to maximize the performance of the company as a whole.
- OEM’s take advantage of these capabilities to quickly invent new services -- or enable 3rd party innovation.
- OEM’s and partners like dealers and suppliers can get access to vehicle data and commands for their own innovation and operations.
- OEM’s and partners experiment with new business models.

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