

Marketing High Technology: Preparation, Targeting, Positioning, Execution

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Commercialization of new high-tech products is often the costliest stage of the entire product development process. Yet even when the process is well managed, the risk of failure remains high. New high-tech products usually have just one shot at the market. Get it wrong and the consequences are invariably fatal. And although the launch strategy is critical, this stage is largely neglected in the business press and academic literature on high-tech marketing, innovation, and new product development.

Persuading a market to adopt a new technology is generally comprised of four stages, shown in **Figure 1**. The first step, market preparation, involves readying customers and other companies for the change. Typically this stage takes place while the product is still in development, though not necessarily so. The second stage in planning the marketing of the product is targeting, followed by positioning based on the expected competitive situation. The final stage involves execution and consists of the strategies that are often the most visible part of the mix, used to achieve specific results. Each of the four stages will be described in turn.

MARKET PREPARATION

Market preparation is intended to get the market ready for the new technology by building awareness and, most important, forming relationships. **Figure 2** shows some examples.

Cooperation/Licensing/Alliances

In many cases, the way a marketer chooses to set up the market is crucial. Some form of coopera-

tion is increasingly seen not as an option but as a necessity. Few companies can go it alone, at least not when the launch of major technology is concerned.

Alliances and licensing arrangements encourage the adoption of technological standards for at least two good reasons.

One is because of the expected boost to sales. Customers are reluctant to adopt when faced with competing and incompatible technologies (recall the days of the VHS and Betamax videocassette formats). They realize that markets rarely allow two competing technologies to thrive, and eventually coalesce around the preferred one, condemning the other(s) to decline.

The other reason is that companies sometimes seek to establish their own technology as the standard, to preempt those of rivals and avoid having a competing standard imposed. This was very much the reason for Psion, Motorola, Ericsson, and Nokia forming a consortium called Symbian. The four agreed to adopt Psion's computer operating system, called EPOC, in the hope that this would become the industry standard for the next generation of wireless communication devices.

A range of strategies are available to the high-tech marketing manager taking a shot at launching the latest technology.

Figure 1
Launching New Technology

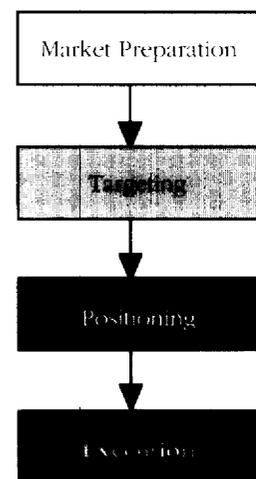


Figure 2
Market Preparation: Some Examples

<i>Form alliances</i>	Psion, Motorola, Ericsson, and Nokia adopting Psion's computer operating system to thwart Microsoft's Windows CE operating system
<i>Supply to OEMs</i>	IBM licensing its hard disk drives
<i>Provide pre-launch information</i>	Apple providing information on the Macintosh NC

such as mobile phones and palm-top computers. The mobile phone is expected to become "smart," sending and receiving data, downloading from the Internet, and storing large amounts of information. The alliance is also an attempt to prevent Microsoft's Windows CE operating system in consumer electronics from becoming the standard. Ericsson, Motorola, and Nokia each had to abandon its own operating system in adopting Psion's—a sacrifice that may prove worthwhile, given *Fortune's* claim that David Potter, Psion's CEO, is the man Microsoft's Bill Gates fears the most (Wallace 1998).

Sometimes the alliances formed can be informal or "loose," arising through mutual advantage. This is because, more and more, technological products rarely stand alone. They depend on the existence of other products and technologies. A good example is the World Wide Web, with its groupings of businesses that include browsers, on-line news, e-mail, network retailing, and financial services. Arthur (1996) calls these networks of products and services that support and enhance each other "mini-ecologies." They are increasingly the basic frameworks of knowledge-based industries, and companies have to secure themselves a place in these loose alliances built around a mini-ecology.

Supply to OEMs

Market preparation can also be tackled by sharing the new technology with original equipment manufacturers (OEMs). This increases the awareness of the product and the technology, and boosts sales via expansion to new markets. IBM developed two powerful hard disk drives, TravelStar 8GS and 3GN, for its own ThinkPad notebooks, but decided to license them to Acer, Gateway 2000, Dell, and other OEMs as well, which plan to use the drives in their portable PCs. This market preparation tactic enables the producer to retain full ownership of its technology while at the same time expanding market potential beyond its own marketing capacity, albeit at a lower margin.

Provide Pre-Launch Information

The type of information released before launch, and the manner in which it is delivered, can be a key tactical decision in the product launch. The publicly visible demonstration of this strategy is the article in the press, detailing the time the product will reach the market, the basis of the technology, and other information. Intel has been releasing details of its new MMX technology-based Pentium-II chip. Articles have also appeared on the Macintosh NC, Apple's forthcoming network computer, based on the company's powerful new chip, PowerPC 750. Those who typically need to be informed before the launch are the distribution network, service suppliers (such as software houses), and the media, who in turn inform potential customers.

The information to be released has to be planned carefully so as to arouse sufficient interest in the new product without losing a competitive edge in a market where imitation can materialize with lightning speed. A careful balance must be drawn that allows for the need to have influential components of the market's infrastructure informed without giving a technological lead away to competitors.

Educate the Market

A special form of providing pre-release information is an education program. This is very ambitious and more long-term than merely releasing information, and thus it is less common. It is exactly what Intel did in the early days of the microchip. Rather than marketing the product directly—there were just too many markets with too many applications for that—it set about educating the various markets on the potential of the technology, leaving them with much greater in-depth knowledge to work out how the product might be used in their particular markets.

However, education has to be managed and timed carefully. Otherwise, the company sells the vision before it has the product to deliver that vision. Not surprisingly, smaller companies shy away from trying to educate markets, leaving it to larger corporations with their greater resources and longer planning horizons.

Create Special Distribution Arrangements

Finally, technology may be launched into new markets as well as currently served markets, which would entail establishing new channels of distribution. Distribution rights may be given to competitors in these new markets. New distribution can also be gained through joint ventures, possibly involving collaborative development of the technology.

TARGETING

Adoption of a new technology is likely to be faster if the marketing strategy is compatible with the segment targeted. Easingwood and Lunn (1992) examined the diffusion of telecommunications products and found that clearly targeted products diffused more rapidly than non-targeted ones (see **Figure 3** for examples).

Target Innovative Adopters

Targeting innovative adopters can take two main forms: (a) targeting both companies and innovative individuals within those companies, or (b) targeting sectors.

Innovative Companies and Individuals.

Based on the familiar model, the technology adoption life cycle, this strategy identifies innovative adopters because they are prepared to buy without seeing the product up and running elsewhere. They do not insist that the technology have a "track record." Moore (1991) divides these early buyers—only a small percentage of the total potential market, but hugely influential—into technological enthusiasts, or "techies," and visionaries. Techies are intrigued by technology and will explore a product's potential for themselves. Their endorsement is vital because it means the product does, in fact, work. Visionaries are the managers with clout, often very senior, who can see a product's potential for overturning existing ways of operating, delivering significant value and competitive advantage to those organizations prepared to grasp the new technology.

Technological enthusiasts and visionaries, although placed together in this innovative group, are very different in some regards. Techies are excited by the technology itself, whereas the visionaries try to find its greater worth—some single, compelling application that uses the full range of the new technology. A visionary is motivated by a potentially significant leap forward, not by the newness of the technology.

Visionaries are a rare breed. They not only have the ability to see the potential when no one else can, they also have the management drive and charisma to persuade the rest of an organization to back the vision. They anticipate a radical discontinuity between the old ways and the new, realizing that this rarely happens smoothly, and so they will tolerate the glitches and setbacks that inevitably occur before this is achieved.

The only way to work with visionaries, says Moore, is to use a small, high-level sales force. Constantly looking to leverage technology, visionaries typically maintain good relationships with techies, so this segment should not be neglected. And techies can be reached fairly easily

through the technical and business press. It is their job to stay alert to all developments, wherever their sources, not just to focus on their own industry.

Early Adopting Sectors. Innovators can sometimes be hard to identify, but they are worth searching out. They start the ball rolling. However, an alternative to identifying individuals with these special attractive characteristics is to target whole sectors that are likely to be early buyers.

USDC developed an active-matrix flat panel display screen—in effect, the first "paper-quality" screen, with each pixel linked to its own transistor—and targeted the product at some of the world's leading air forces, a sector with a pressing need for the latest technology.

In the telecommunications sector, NTT has developed Digital Photo System, a means of transmitting a photo by a digital camera over the airways via cellular phones to a laptop computer and from there to a printer. The whole process takes about 10 seconds and can be done globally. The service was aimed initially at the newspaper and insurance sectors, both of which would particularly benefit from an acceleration in the speed of the internal processing of photographs.

Target the Pragmatists

Sometimes called the "early majority," pragmatists (as Moore calls them) are the large group of adopters following behind the techies and visionaries, though Moore argues that the gap between the two groups is so large it deserves to be called a chasm. Pragmatists typically comprise large organizations with a clear need to adopt new technologies to retain or improve competitiveness, but with a reluctance to do so. The dislocation would be so extensive and the size of the

Figure 3
Targeting: Some Examples

<i>Target innovative adopters</i>	NTT taking its global photo transmission system to sectors, such as the insurance industry, that are likely to be early adopters
<i>Target pragmatists</i>	Amgen using a large sales force to promote its hepatitis C drug to <i>all</i> hospital specialists
<i>Target conservatives</i>	Microsoft aiming its integrated software product Works at the PC conservative market
<i>Target current customers</i>	IBM Software Group working with many of the Global 5000
<i>Target competitors' customers</i>	Xerox targeting its digital copiers at Hewlett-Packard customers

investment required to switch the whole firm over to the new technology so large that they are risk-averse. People in this group are reasonably comfortable about taking on new technology, but only when some well-established references exist. Their preference is for evolution, not revolution. They are looking for something that can be slotted into existing ways of doing things. "If the goal of visionaries is to take a quantum leap forward," explains Moore, "the goal of pragmatists is to make a percentage improvement—incremental, measurable, predictable progress."

Marketing to pragmatists is a matter of:

- attending the industry conferences and trade shows;
- getting frequent mentions in the industry magazines;
- being installed in other companies in the same industry;
- developing industry-specific applications;
- having alliances with other key suppliers to the industry.

As Moore observes, pragmatists like to hear companies talk about their new products as "industry standards." What they hate to hear is products described as "state-of-the-art." This makes them extremely edgy. Pharmaceutical companies are well known for targeting their new drugs at hospital specialists working in the leading teaching hospitals. However, they do not neglect the pragmatists either. Amgen has assembled a sales team of about 50 people to promote its new hepatitis C drug to all the hematologists and gastroenterologists working in hospitals who may have to treat patients with the ailment.

Target Conservatives

The "conservatives," or "late adopters," really are not that keen on new technology. By and large, they would really rather not adopt any if they could get away with it, but competitive pressures may force them to do so. They are not that confident in their ability to adapt to new technology, so they like to see evidence of support. By the time the technology gets to them, there will probably be an established standard. Conservatives like to buy pre-assembled packages, with everything bundled. "They want high-tech products to be like refrigerators," says Moore. "You open the door, the light comes on automatically, your food stays cold, and you don't have to think about it."

However, it can be a big mistake to neglect this section of the market. For one thing, it is large—probably around a third of the whole market. It is often not developed as systematically as it should be, possibly because high-tech companies do not generally find it easy to empathize with this group. The product development costs are apt to be fully amortized at this stage, so

extending the product's life should be highly profitable.

Because of conservatives' reluctance to come to grips with a new technology and its implications, a product has to be made increasingly easy to adopt if a high-tech company is to succeed with this group. The DOS PC operating system stalled when it reached the late adopter segment—the home market, the home office, the small business. This segment does not have the support offered in large companies and was disinclined to teach itself DOS. It took the greater simplicity of Windows 3.0 to bring it into the market. Microsoft has aimed its product Works, an integrated, all-in-one word processor, spreadsheet, and database (none of which are state-of-the-art), at the PC conservative market.

Target Current Customers

Existing customers can be an obvious target group for well-established companies. So it makes sense for IBM Software Group, the world's second largest software firm—which has very strong customer relationships with the Global 5000, the world's largest companies—to think first of its current customers. Although current customers ought to be the most secure market, this is not necessarily the case. They can be hard to satisfy and quite costly to retain. Such is Intel's experience. It is having to cut the prices of some of its computer chips in an attempt to retain big corporate customers such as Compaq and Packard Bell. The latter are threatening to switch to Cyrix, the rival microprocessor producer, as they do everything possible to reduce the costs of their lowest-priced PCs.

Targeting existing customers is a strategy particularly appropriate to rapidly changing, advanced technologies. It can be particularly relevant for complex technologies when the decision to adopt often relies on a high degree of technical expertise and mutual trust between buyer and supplier.

Target Competitors' Customers

Finally, competitors' customers can present a prime opportunity, especially when the company's own product is competitive and the competitor has a large market share. Xerox would claim that this is the case for the new digital copiers designed by its Office Document Product Group. The copiers, which have faxing, scanning, and printing capabilities when connected to the personal computers of Hewlett-Packard's customers, are targeted toward HP and its dominance in the printer market.

Such a practice is commonplace in the pharmaceutical industry. Amgen has pitched its new

hepatitis C treatment drug, Infeger, at those customers for whom the existing treatments, such as Schering-Plough's Intron A or Roche Holdings' Roferon A, have not been successful.

Of course, this strategy is very aggressive. For brand new technologies, it may be counterproductive. Aggressive competitive tactics may be seen as undermining the credibility of the entire technology, rather than just the competitor's product, as may have been intended.

POSITIONING

Some new technologies are so specialized that targeting and positioning strategies are too unambiguous and virtually redundant. Other new technologies are so wide-ranging in their potential applications that the market needs some strong clues as to targeting and positioning before it will respond. Many products fall between these two extremes.

Positioning can be based on tangible (technological) or intangible characteristics (such as image), with technologically intensive industrial markets favoring the former. Where the market is not so technologically informed, or the benefits of the new technology are not so easily differentiated from competitors, positioning characteristics are likely to be more intangible. Positioning possibilities can be numerous, but some of those used most often are described here (see **Figure 4** for examples).

Emphasize Exclusivity

A way to differentiate the product offer is by emphasizing how exclusive it is. In other words, can the product be placed in the upper segment of the market, where the margins are usually higher? For example, by focusing on quality, engineering, and adjustability, Recaro is offering a top-of-the-range child's safety seat—the Recaro-Start—that appeals to wealthier parents who place high priority on their children's safety. The company is playing heavily on its reputation for producing high-tech safety seats for Porsche and Aston-Martin.

Emphasize a Low Price

It used to be that low prices were considered an inappropriate lever for high-tech products and services. The market's reluctance to purchase was due to the misgivings it held about the new product's performance, which was largely unproven. The best strategy, marketers believed, was to address this reluctance directly by lowering the perceived risk that the product would not come up to expectations, or by reducing the perceived likelihood that it might be made redun-

dant by a superior technology. In any case, high margins were needed to recoup the high costs of development.

Well, not necessarily anymore. Low price is used more and more in high-tech markets. For instance, phone companies will have to pay just \$5 per device to use EPOC from Symbian, versus a reported \$25 for Microsoft's Windows CE.

Emphasize Technological Superiority

Focusing on the technological superiority of a new high-tech product is common. When technology is changing rapidly and perhaps radically, it would seem that positioning a product on the basis of the latest technology built into it should reflect the product's true *raison d'être*.

Xerox's new digital copiers are priced about 10 percent higher than old-style copiers because of the greater quality and reliability they offer compared to the old "light lens" technology copiers. This practice is also observed in the computer component manufacturing industry, where such new products as "bonded modems," storing units, and processor chips justify their premium pricing through their advanced technological features.

However, emphasizing such superiority does have its drawbacks. First, by stressing technological features, the marketer is assuming a certain level of knowledge that may not be present in at least part of the target market. Second, the preoccupation with technological specifications may obscure the genuine benefits customers could realize from the technology. Given the buying center nature of many high-tech adoption decisions involving technical specialists and nonspecialists, not all of whom are capable of translating technical specifications into everyday benefits, it may be more successful to come up with a more benefit-specific positioning tactic.

Figure 4
Positioning: Some Examples

<i>Emphasize exclusivity</i>	Recaro (supplier to Porsche and Aston Martin) with its top-of-the-range child's safety seat
<i>Emphasize a low price</i>	Just \$5 per mobile phone for the operating system from Symbian (\$25 quoted for the alternative)
<i>Emphasize technological superiority</i>	Xerox focusing on the superiority of digital copiers over the old technology
<i>Emphasize a "safe bet"</i>	Lucent Technologies designing its digital phones to be compatible with international standards

Figure 5
Execution: Some Examples

<i>Use opinion leaders</i>	Compaq and NEC Technologies securing endorsements from technical journalists
<i>Reduce the risk of adoption</i>	Luz Engineering installing and running its industrial solar heaters that supply clients with energy at guaranteed prices
<i>Cultivate a winner image</i>	IBM advertising its position as recipient of the most U.S. patents for the fifth year running
<i>Concentrate on a particular application</i>	Lotus Notes focusing on worldwide accounting and consulting firms

Emphasize a 'Safe Bet'

Stressing customer protection in the product is important because it enhances the product's credibility element and reduces the associated risk of moving to a new technology. Lucent Technologies focused on the fact that the specifications of both of its two newly introduced digital phones fall under established standards. One of the phones operates on the Code Division Multiple Access (CDMA) technology standard of the United States. The other, which is a "dual mode/dual band" handset, operates on the Time Division Multiple Access (TDMA) standard introduced by AT&T to serve the entire European market, where the existence of different networks can otherwise hinder compatibility.

EXECUTION

As the final stage and therefore the one that completes the product's projection into the marketplace, execution is designed to trigger a positive purchase decision. The strategies used depend on the objectives of the launch itself, which in turn depend on the state of technology and the awareness the market has of it. For a very new technology, of which the market is unaware, execution tends to focus on conveying the generic benefits. At the other extreme, where the technology is well known to the market, the launch objectives focus more on establishing a brand name and competitive advantage. **Figure 5** provides examples.

Use Opinion Leaders

It makes good sense to obtain the support of opinion leaders. As Moore states, "No company can afford to pay for every marketing contact made. Every programme must rely on some on-

going chain-reaction effects, what is usually called 'word of mouth.'" Word-of-mouth is invaluable, of course, but the support of opinion leaders, who are industrial rather than public celebrities, can also be taken on board more formally, such as in advertising or through appearances at company seminars.

Compaq and NEC Technologies have managed to secure the endorsement of a number of well-known technical journalists for their FPDS screen. Pharmaceutical companies try to communicate the views of prominent doctors on their new drugs to influence the views of general practitioners and other doctors.

Reduce the Risk of Adoption

It is sometimes possible to reduce adoption risks. Can the product be offered on an introductory trial? Can it be leased? Luz Engineering, a producer of industrial solar heaters costing between \$2-4 million, came up with a novel variation on this approach. Now Luz is prepared to sell its systems. However, it is also prepared to install and operate the solar heaters itself, in which case the client merely contracts to buy steam at 350°F for 20 years at a discount from the prevailing local power company rate. This is a "no-lose deal" from the client's perspective. The client pays for none of the installation and operating costs, but enjoys most of the expected benefits of the technology, without the associated risks.

Cultivate a Winner Image

Individuals and organizations can easily be confused by too much choice. Their first reaction, when faced with a confusing purchasing decision, is to postpone it. But when this is no longer possible, they vote for the safe choice: the market leader. There is safety in numbers. And this position can be reinforcing in technology markets. Other companies will recognize the leadership position and design supporting products and services around the market leader, which will thus become even more the preferred choice. The number one product becomes easier to use, cheaper to use, and better supported. There is a "winner take most" tendency, as Arthur states—the phenomenon of increasing returns. The bigger you get, the more apt you are to get bigger still. Conversely, the smaller you get, the more apt you are to shrink even more. Success breeds success, failure breeds failure. You have to become a "gorilla," because if you do not, you'll be a "chimpanzee" or, more likely, a "monkey."

Thus, companies should try to cultivate a winner image for themselves and their products. However, this often involves allocating considerable resources to a big media splash aimed at

communicating the (preordained) success of the new product. So this strategy is most popular with large companies. When Microsoft launched Windows 95, it did not pull its punches or spare its expenses. In the U.S., the Empire State Building was bathed in Windows colors. In the U.K., the *Times*, sponsored by Microsoft, doubled its print run and was given away free. In Australia, the Sydney Opera House was commandeered. The worldwide event, accompanied by the Rolling Stones' hit "Start Me Up," was said to have cost \$200 million, but was hugely successful: one million copies sold in the U.S. in the first four days, compared to the 60 days it took the upgrade to MS-DOS to reach that level.

Of course, the approach to this position can be more subtle. In the last year, IBM received more U.S. patents than any other company, taking the top spot for the fifth consecutive year in a list that used to be dominated primarily by Japanese firms. This achievement has been stressed by IBM through articles in the technology sections of top-rated journals. It has also been the theme of an advertising campaign that aims to build a leader image for the company.

Sometimes the leadership position cannot be established across the entire market, in which case it should be established in a market segment. It is important to be the biggest fish in the pond, even if it means searching out a very small pond.

A market leader position is particularly important for pragmatists. These are the people who are contemplating committing their organizations to the new product—a much less risky gamble if the new product is the market leader.

A company that can establish a lead in a segment is in a very strong position. All the major customers have committed themselves to the product and so want it to remain the standard. The company can only lose such a position by shooting itself in the foot. Moore believes that segments conspire, unconsciously, "to install some company or product as the market leader and then do everything in their power to keep [it] there." This, of course, puts up huge barriers to entry for other competitors. If the leader plays its cards right, it can end up "owning" the segment.

Concentrate on a Particular Application

Concentrating on a particular application is all about crossing the chasm, the huge gulf that separates the techies and visionaries, few in number, from the much larger mainstream market dominated by pragmatists. The way across the chasm is to target the company's resources to one or two very specific niche markets where it can dominate rapidly and force out competitors. It can then use the dominance of the first niche to attack the surrounding niches.

Moore uses the analogy of the Allies' D-Day invasion strategy in World War II: assembling a huge invasion force and focusing it on one narrowly defined target, the beaches of Normandy, routing the enemy, then moving out to dominate surrounding areas of Normandy. In other words, establish a beachhead, then broaden the basis of operations.

Serving the needs of a particular segment is all about focusing the company's resources on customizing the product to the needs of that segment. The segment wants a customized solution. It wants the "whole product" with all relevant services, not 80 percent of the whole product with the responsibility of supplying the missing 20 percent itself. Sales in several segments would soon stretch the company's development resources to the breaking point as it tried to customize the product to each segment's needs. Lotus Notes managed to escape the chasm when it focused on the global account management sector, particularly on worldwide accounting and consulting firms.

In addition, niche sales are driven by references and word-of-mouth within that niche. Failure to build up a core level of business in a particular segment means that momentum in any one single segment is never established. Pragmatists and conservatives talk to people in their own industry and look for solutions that have been proven to work there.

Tactical Alliances. Companies sometimes have the opportunity to form tactical alliances with smaller firms to help put a "complete product" in place. Market niches will coalesce behind a product much more readily—elevating it effectively to the position of a standard—if that product is supported by a number of products that fill in the gaps the market values but that the main product could not possibly supply. Producers of software packages often welcome the entry of smaller firms with their add-on programs to help provide the fully rounded complete product. It is a matter of gathering the appropriate partners and allies to jointly deliver a more complete product.

This is, however, very different from the co-operation/licensing/alliance approach discussed earlier, which is more formal and strategic. Tactical alliances tend to occur spontaneously at a later stage in a technology's development as smaller companies, realizing that a product has the potential to become a standard, desire to become associated with that standard.

Introducing a new technology offers a marketplace the first opportunity to experience the brand new product. So the manner in which the introduction is handled is critical. Everything has to come together in what is usually a narrow window of opportunity. Get it wrong,

and there may be little time to put things right. By this stage, the investment in the new technology may be considerable, yet the chances of rejection or indifference are quite high.

The strategies proposed here are all designed to reduce the risks of failure. Of course, a complete and consistent strategy will assemble one or more components from each of the preparation, targeting, positioning, and execution stages.

Technology-intensive products and companies are at the leading edge of many Western countries' economies. By examining the range of illustrations included here, it is hoped that managers can help the new technology take its intended role in these economies. □

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