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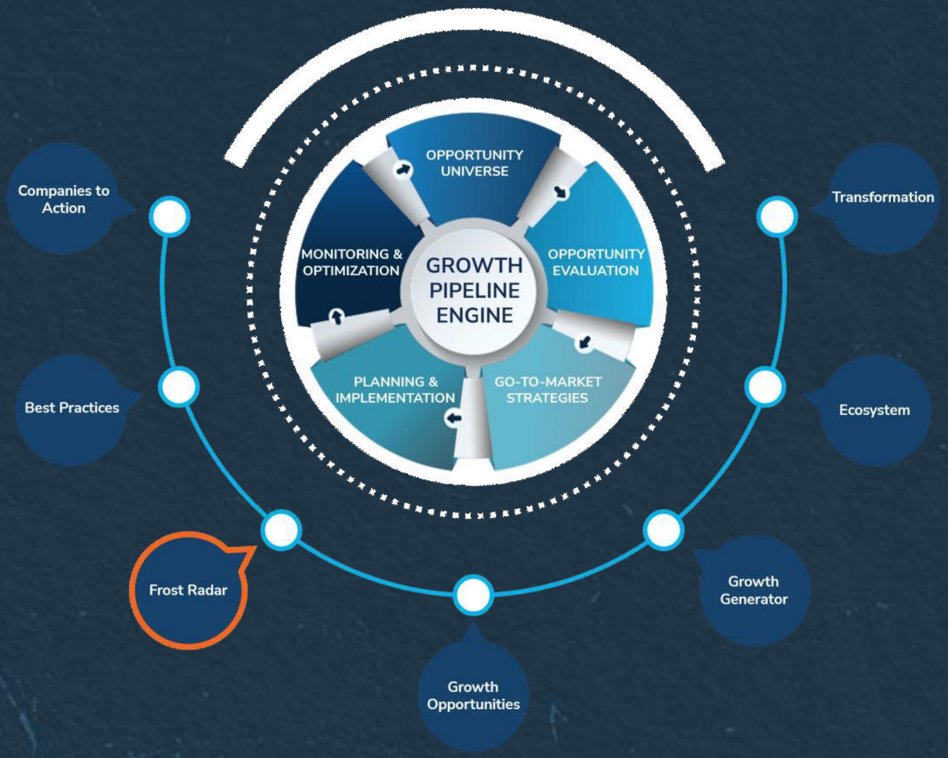
Frost Radar™: Smart Building Solutions, 2026



A Benchmarking System to Spark Companies to Action - Innovation That Fuels New Deal Flow and Growth Pipelines

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Strategic Imperative and Growth Environment

Strategic Imperative

- The smart buildings market is moving decisively from rule-based, insight-only platforms to AI systems that monitor, analyze, act, and continuously learn without operator intervention, autonomously adjusting HVAC setpoints, triggering predictive maintenance, optimizing energy consumption, and detecting security anomalies in real time. Companies that remain at the “insights-and-dashboards” stage risk commercial displacement as enterprise buyers evaluate autonomous operational outcomes as the primary procurement criterion.
- The fragmentation of building management systems (BMS), integrated workplace management systems (IWMS), computerized maintenance management systems (CMMS), and enterprise ERP into siloed systems with no shared data model is the primary barrier to portfolio-level building intelligence. Market players must establish a governed, owner-owned data layer (through open APIs, standardized ontologies, and certified cross-system connectors) that enables AI applications to operate across domain boundaries without proprietary lock-in.
- An estimated 6 million small or medium-sized commercial buildings in the United States alone operate without modern building automation, representing the largest untapped addressable market in the industry. It is imperative to capture this opportunity with software-defined, reasonably priced subscription solutions that offer near-zero deployment complexity.
- It also is important to build ecosystem-led growth engines to scale market reach, because no direct sales force can reach the millions of buildings that constitute the smart buildings total addressable market. The highest-leverage growth investment for any market participant is ecosystem architecture, which is designing platform APIs, partner certification frameworks, revenue-sharing models, and OEM integration programs that convert channel partners, system integrators, and technology vendors into compounding distribution assets that grow in value as the ecosystem scales.

Strategic Imperative (continued)

- High-growth end-user verticals, including data centers and healthcare, demand purpose-built AI agents, compliance frameworks, and life cycle accountability models that command the market's highest contract values, longest tenure commitments, and the highest customer retention economics, as deep vertical specialization raises the bar for competitors to displace incumbent solutions. Companies that externally validate vertical-specific capabilities in these two areas will capture the most defensible revenue through 2031.
- Transitioning from project-based revenue to recurring software and outcome-based contracts is crucial to limit exposure to construction cycle volatility that provides no compounding commercial value. The strategic imperative is to identify the recurring revenue entry point in each current offering, such as energy management subscriptions, AI optimization-as-a-service, predictive maintenance SLAs, portfolio ESG reporting platforms, and converting project customers into multiyear, platform-driven, building life cycle subscribers.
- Accelerating IT/OT convergence has fundamentally expanded the threat surface of commercial buildings, making cybersecurity posture a board-level disqualification criterion in healthcare, data center, pharmaceutical, and government procurement. Independent certification is now the minimum commercial requirement for regulated-sector market access across all smart building verticals.

Source: Frost & Sullivan

Growth Environment

- Smart building solutions market revenue was estimated at $20,045.8 million globally in 2025 and is forecast to increase at a compound annual growth rate (CAGR) of 12.7% through 2031, driven by accelerating enterprise decarbonization mandates, the proliferation of AI-driven building intelligence platforms, rising energy costs, and a structural shift from reactive facility management to predictive building operations and maintenance.
- North America accounted for the largest regional revenue share at 39.5% in 2025, reflecting a mature installed base of commercial buildings, enterprise sustainability mandates, and strong data center investment. Europe followed at 28.8%, with growth driven by EU Energy Performance of Buildings Directive (EPBD) compliance, Corporate Sustainability Reporting Directive (CSRD) ESG disclosure obligations, and large-scale building modernization programs.
- Asia-Pacific, with a 23.7% revenue share in 2025, is forecast to record the highest regional CAGR of 16.3% from 2025 to 2031, surpassing Europe in revenue contribution in 2029, as rapid urbanization, government-mandated green building programs, and accelerating data center and commercial real estate investment drive demand. The region's smart building growth is greenfield-led, with an unprecedented volume of new commercial, hospitality, healthcare, data center, and mixed-use construction projects in India, Southeast Asia, and China providing a clean-sheet technology specification opportunity.
- This difference allows smart building platform providers to deploy integrated, cloud-native, AI-first architectures without the legacy BMS integration constraints that slow deployment in mature markets. India's projected 7%-plus addressable market CAGR over the next five years, cited by the leading market players as a key country focus, combined with other national initiatives from mature Asia-Pacific economies, creates a multidecade demand wave that is only beginning to be captured by the companies benchmarked in this Frost Radar™ analysis.

Source: Frost & Sullivan

Growth Environment (continued)

- Data centers are the highest-growth vertical in the smart buildings market, recording an estimated 18.8% CAGR from 2025 to 2031 and growing from a 4.0% revenue share in 2025 to approximately 5.5% by 2031, driven by the intersection of AI infrastructure investment, power density escalation, energy regulatory pressure, and power utilization effectiveness (PUE) optimization requirements that have no equivalent in any other building type. The global data center market's unprecedented investment cycle, fueled by hyperscale AI compute buildouts, colocation demand from enterprise AI adoption, and edge computing proliferation, is creating immediate, multibillion-dollar demand for unified building, power, and energy management solutions capable of managing liquid cooling, thermal management from chip to chiller, automated fault detection, and real-time PUE monitoring simultaneously.
- Healthcare, education, and infrastructure are the next highest-growth verticals, each driven by a distinct regulatory and ESG-aligned investment mandate. Healthcare is projected to be the second-fastest growing vertical at a 14.7% CAGR till 2031 as hospital networks globally seek to reduce energy intensity, ensure clinical environmental compliance, and demonstrate the sustainability credentials required for institutional funding. Education, growing at a 12.0% CAGR, represents one of the largest untapped retrofit markets in North America and Europe, with Energy Savings Performance Contract (ESPC) financing models removing the capital barrier that historically prevented adoption. Commercial buildings remained the largest vertical by revenue share at 39.5% in 2025, growing at a CAGR of 11.7% till 2031, driven by portfolio-level energy optimization, hybrid workspace reconfiguration, and ESG-aligned asset repositioning across office, retail, and hospitality subsegments. Industrial, infrastructure, federal buildings, and high-rise residential collectively contributed 24.5% of 2025 revenue and are growing at double-digit CAGRs.

Source: Frost & Sullivan

Growth Environment (continued)

- Frost & Sullivan structures the smart building solutions market around three strategic pillars:
  - **Energy Efficiency,** delivered through advanced building energy management systems (BEMS) and sustainability management solutions
  - **Operational Efficiency,** enabled by digitized asset maintenance and asset management platforms
  - **Occupant Comfort and Safety,** delivered via workplace experience solutions and safety and security management. The workplace experience solution includes IoT and AI-enabled space and occupancy intelligence platforms that optimize occupant well-being, productivity, and experience but does not encompass traditional full-scale integrated workplace management systems (IWMS).
- At its core, smart building solutions leverage IoT sensors, edge computing, cloud platforms, and artificial intelligence (AI) to collect, analyze, and act on real-time data. This transforms traditionally passive buildings into responsive, connected, and autonomous environments that simultaneously optimize energy consumption, operational performance, and occupant well-being.
- Frost & Sullivan studies related to this independent analysis:
  - Building Energy Management System Market, Global, 2024-2030
  - Growth Opportunities in Global Homes and Buildings Industry, 2026
  - Top 5 Growth Opportunities in Smart Buildings, 2026

Source: Frost & Sullivan

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Frost Radar™: Smart Building Solutions

Frost Radar™: Smart Building Solutions

In a high-growth market with more than 50 qualified participants meeting a revenue threshold of at least $20 million, Frost & Sullivan independently evaluated the landscape and selected just 15 companies to be benchmarked in this Frost Radar™. This small, carefully chosen group represents organizations that rise above the broader market; demonstrating not only strong growth, but a clear capacity to innovate and lead. Inclusion is not simply recognition; it signals that a company is operating at the forefront of its industry.

This evaluation is led by Frost & Sullivan's experienced global analyst team, combining deep domain expertise with a rigorous, fact-based approach. Using our proprietary, multi-dimensional benchmarking methodology, applied consistently and validated by analysts. Frost & Sullivan ensures a fair, globally comparable, and defensible assessment of true market leadership.

Source: Frost & Sullivan

Frost Radar™: Competitor Categories

GROWTH CHAMPIONS

- Companies that have achieved significant market growth through strong execution.
- Compete by leveraging proven technologies, scalable business models, and operational efficiency.
- Included for their ability to consistently capture demand and deliver results at scale.
- Must increase investment in innovation to sustain long-term leadership.

VISIONARY LEADERS

- Companies that demonstrate leadership across both growth and innovation at scale.
- Compete by combining transformative innovation with disciplined execution.
- Included for their ability to shape market direction while delivering sustained growth.
- Must continue to scale innovation while defending leadership in an increasingly competitive market.

CONTENDERS

- Companies with focused strength in specific segments, use cases, or regions.
- Compete through deep specialization and targeted customer relevance.
- Included for demonstrating credible capabilities, though limited in scale or innovation breadth.
- Must expand both market reach and innovation capabilities to compete at scale.

INNOVATORS

- Companies that lead in technology, product innovation, and market disruption.
- Compete by introducing differentiated solutions and shaping future use cases.
- Included for their strong innovation capabilities, despite more limited commercial scale.
- Must strengthen go-to-market execution to translate innovation into sustained growth.

Source: Frost & Sullivan

Frost Radar™ Competitive Environment

- Siemens, Honeywell Technologies, Carrier, Schneider Electric, Acuity, Planon, Azbil Corporation, ABB and Spacewell emerged as Visionary Leaders on the Frost Radar™.
- Siemens and Honeywell Technologies are the Growth and Innovation Index leaders, underscoring their unmatched combination of platform depth and commercial velocity in the global market.
- What distinguishes Visionary Leaders is a common strategic orientation: each has made a decisive, sustained commitment to software-defined platforms and AI-native building intelligence, moving toward recurring software and services revenue models and allocating above-industry-average R&D investment that has translated into commercially deployed, outcome-verified AI capabilities rather than roadmap aspirations.
- Trane Technologies and Johnson Controls earned Innovators status through decisive technology platform investments, but they are at an earlier or transitional stage of translating that innovation into consistent growth at a scale exhibited by Visionary Leaders. Their lower Growth Index scores reflect execution-stage transitions rather than any limitation in the underlying platforms.
- 75F is one of the fastest-growing, AI-native building management companies and is a Growth Champion on the Frost Radar™, with a full-stack proprietary IoT platform that is uniquely proven in zero-downtime critical-care retrofits.
- Delta Controls, Lynxspring and Bosch—all Contenders on the Frost Radar™—are commercially established participants with proven technologies and loyal customer bases, but face structural scale, geographic concentration, or platform depth constraints that position them below market leaders on the Innovation and Growth Indexes.

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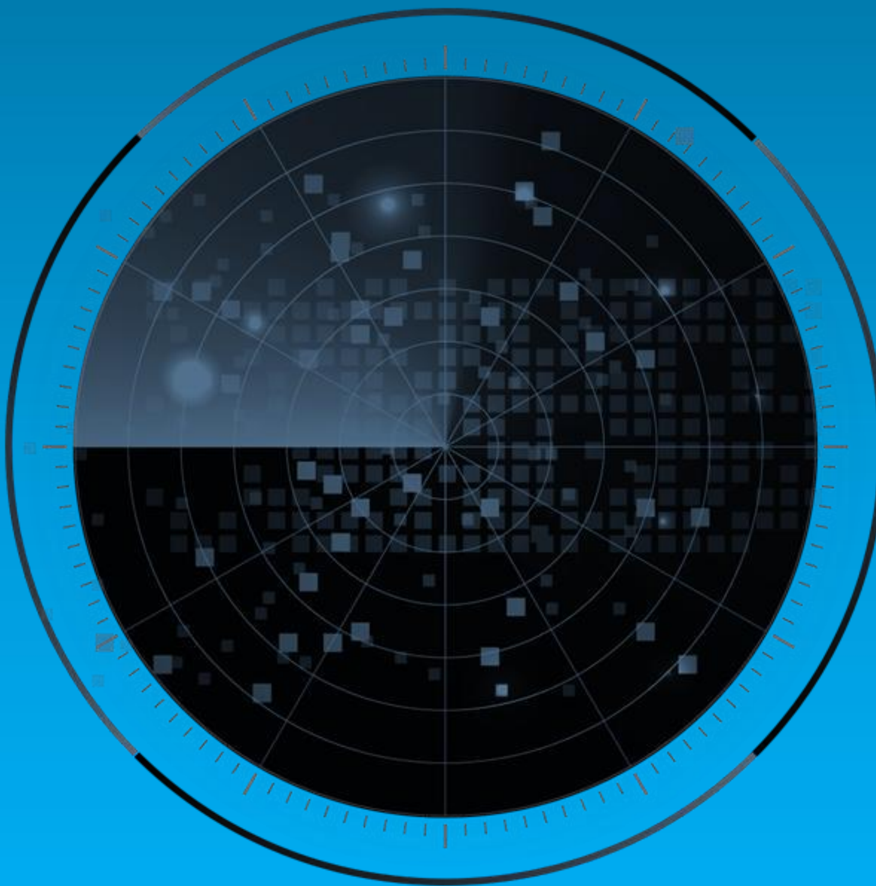
Frost Radar™: Companies to Action



Carrier

VISIONARY LEADER

INNOVATION SCORE **4.75**

GROWTH SCORE **3.85**

INNOVATION

- Carrier Global Corporation's Software and Controls Solutions (SCS) business, encompassing Carrier Abound, Automated Logic Corporation (ALC), and Nlyte, stands apart through a decade-plus investment in AI-driven analytics, multivertical managed services, and deeply integrated hardware-software-services architecture. Carrier dedicates a significant portion of its R&D budget to the SCS business, creating a durable and widening innovation lead.
- The Abound Insights platform, built on more than 10 years of operational data and offering over 1,100 predictive insights, now incorporates the Tell Me More generative AI feature, enabling conversational diagnostics, scenario analysis, journaling, and summarized actionable reports that help address the technician shortage crisis impacting facilities operators globally.
- The Abound Insights platform is connected to more than 165,000 pieces of equipment across sites in North America, Europe, and Asia. Carrier Abound currently manages more than 34,000 sites and has cumulatively saved customers over 7 billion kWh. It has earned 36 patents: a verifiable proof of innovation that competitors cannot yet replicate at this scale.
- Equipment coverage has expanded to more than 30 equipment classes, with ongoing additions across HVAC, refrigeration, lighting, controls, and diesel generators, enabling Abound to serve commercial real estate, data centers, healthcare, higher education, hospitality, manufacturing, retail, and telecom sectors.

Source: Frost & Sullivan

Carrier (continued)

VISIONARY LEADER

INNOVATION SCORE **4.75**

GROWTH SCORE **3.85**

INNOVATION

- Abound Occupant Assistant integrates data from RFID-enabled access control, room reservations, occupancy density management, and automated shade and lighting control into a unified occupant experience layer. This capability moves Carrier beyond energy and maintenance into workplace experience—a rapidly growing enterprise priority.
- Five global customer command centers (Atlanta, Bengaluru, Morocco, Shanghai, and Tokyo) operating on a follow-the-sun model and staffed by multibrand building automation system (BAS) experts, enable 24/7 managed services delivery at a broad scale and language coverage that no start-up or regional player can match.
- Nlyte, a data center infrastructure management (DCIM) software provider, extends Carrier's smart building stack into mission-critical data center environments via integrated data center management, tracking power from the building meter down to individual server workloads, correlating compute utilization with thermal loads, and enabling AI-guided tech refresh planning and precision cooling. This capability is a differentiator from traditional BAS vendors. QuantumLeap™, Carrier's end-to-end thermal management suite for data centers, addresses the thermal life cycle from chip-level cooling to chiller systems.

Source: Frost & Sullivan

Carrier (continued)

VISIONARY LEADER

INNOVATION SCORE **4.75**

GROWTH SCORE **3.85**

GROWTH

- Carrier Abound is targeting growth over the next five years, driven by accelerating vertical diversification, geographic expansion, and a shift from project-based to recurring managed services revenue. 2025 marked Abound's highest-ever annual bookings since its inception—a milestone validating the growth of the platform.
- Carrier Data Center sales doubled to about $1 billion in 2025 and are projected to grow 50% in 2026 as AI and HPC infrastructure buildout accelerates thermal management demand. Carrier's QuantumLeap integrated data center solutions suite and Nlyte DCIM position SCS as a full-stack digital infrastructure partner for hyperscalers, colocation operators, and enterprise data centers.
- Healthcare is emerging as another high-growth new vertical: a five-year Abound Occupant Assistant contract with a 4-million-square-foot specialized healthcare facility signed in Q1 2026, alongside a large US clinic network with 2,500+ locations where Phase 1 Abound Managed Services across 100 clinics in five months delivered 6.7% average monthly energy savings (vs. a 3.5% target), 78% remote issue resolution, 45 truck rolls avoided, and 96%+ temperature internal compliance, coinciding with 35% fewer patient complaints YoY.
- Q1 2026 new wins across six verticals include different types of engagements, from SaaS to advisory services to managed serviced. Three strategic renewals in Q1 2026, including a US customer engaged since 2019 and an Indian food service operator engaged since 2014, indicate stickiness and compounding portfolio depth.

Carrier (continued)

VISIONARY LEADER

INNOVATION SCORE **4.75**

GROWTH SCORE **3.85**

GROWTH

- Over 70,000 chillers connected globally (up 50% YoY), 110,000 chillers under long-term service agreements, and aftermarket sales growing in double digits for the fifth consecutive year create an installed base that generates recurring SaaS, advisory, and managed services revenue.
- Three tiered service offerings—self-service SaaS (Abound Predictive Insights), advisory (Abound Advisory Services), and full managed services (Abound Managed Services)—allow Carrier to serve small and medium-sized business (SMB)-scale buildings, food service chains, Fortune 500 enterprises, and campus-scale healthcare networks. It more than doubled customer counts YoY in the SMB tier.
- PUMA India has partnered with Carrier Abound since 2021, initially starting with select stores and then expanding across all company-owned and operated stand-alone stores in India. Results across 90 connected stores included over 10% average energy savings between October 2021 and September 2024 (equivalent to carbon sequestered by 10,607 tree seedlings over 10 years); 65 stores maintaining humidity below 70% from July 2024 to October 2024, helping preserve merchandise quality; and 11 stores independently certified for maintaining healthy indoor air quality by an NABL-accredited laboratory. PUMA India's senior director of retail stated: "We get a full view of all connected stores across India and how they are consuming energy. This project reflects our commitment to climate action."

Carrier (continued)

VISIONARY LEADER

INNOVATION SCORE **4.75**

GROWTH SCORE **3.85**

FROST PERSPECTIVE

- Frost & Sullivan positions Carrier as a Visionary Leader, viewing Carrier's SCS business as the most operationally mature and vertically diversified smart building solutions in the market, underpinned by a decade of AI model training, a genuinely global command center infrastructure, and a hardware-software-services integration that few competitors can replicate end to end. However, Carrier must now execute decisively on strategic imperatives to convert maturity into dominant market share.
- Carrier may consider prioritizing brand awareness investment and targeted re-education campaigns in existing channel relationships to smooth the EcoEnergy Insights-to-Abound transition and prevent it from slowing adoption in secondary growth markets. Geographic revenue concentration in North America (with India and Australia as secondary growth markets) leaves significant recurring revenue potential in Europe, Southeast Asia, and the Middle East undercaptured, particularly given the rapid expansion of green building mandates and ESG disclosure requirements in these locations.
- Carrier may want to consider developing dedicated data center go-to-market collateral positioning QuantumLeap™, featuring Nlyte, as one of the only solutions providing chip-to-chiller thermal visibility n a single vendor relationship, targeting hyperscaler procurement cycles in North America and Southeast Asia before similar solutions from automation industry leaders fully mature.
- Carrier may consider formalizing AI governance and model explainability documentation for healthcare and pharmaceutical customers, converting the Tell Me More GenAI feature's diagnostic depth into an asset that competitors deploying black-box AI don't offer, and accelerating procurement decisions in compliance-driven verticals.

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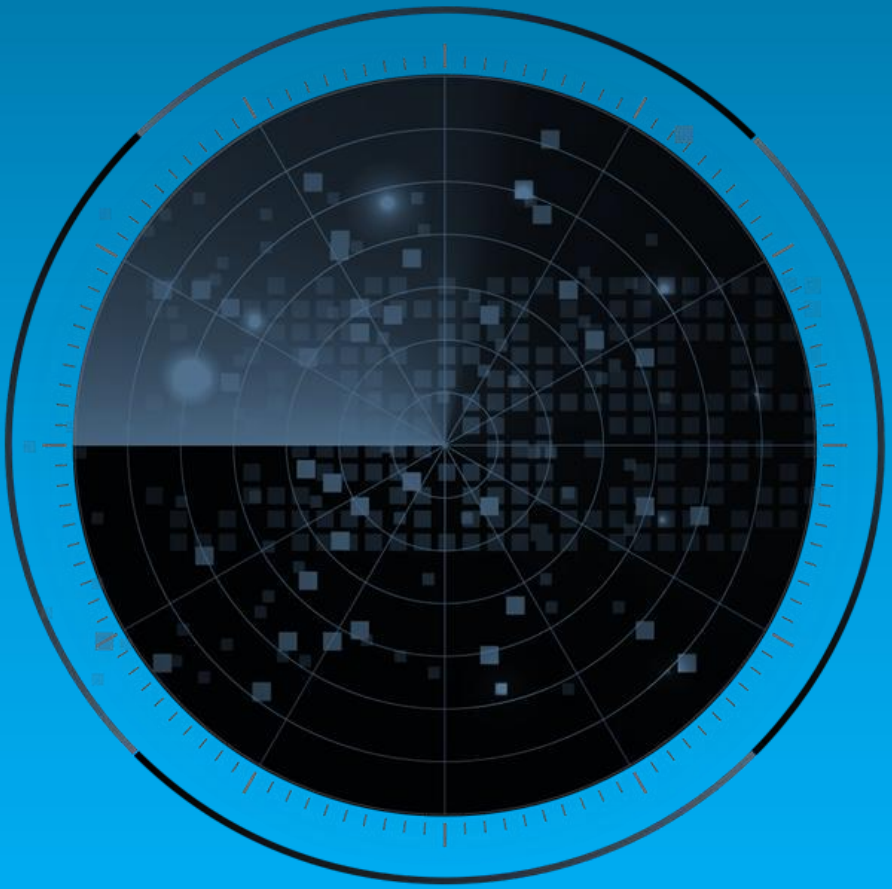
Best Practices & Growth Opportunities



Best Practices

1. The strongest smart building AI strategies work in three layers: AI built into the platform for autonomous performance, open APIs and natural language interfaces for enterprise integration, and governed API tools for customers and partners to build purpose-built applications within platform guardrails. Together, these layers compound capability and customer stickiness.

2. The market's highest-retention and highest-margin revenue streams share one organizational characteristic: vendor incentives aligned with the building's operational performance across multiyear or multidecade time frames through ESPCs, condition-based maintenance SLAs, and public-private partnership agreements, generating compounding recurring revenue that project completion and hardware transaction models structurally cannot produce.

3. Enterprise buyers are increasingly won through independently verified outcome evidence rather than platform feature narratives. Companies that systematically invest in IPMVP-aligned energy savings documentation, third-party ROI validation, and quantified carbon avoidance metrics shorten procurement cycles, command premium pricing, and build commercial credibility that aspirational capability claims cannot replicate.

Growth Opportunities

1 Data centers are the fastest-growing vertical at an estimated 18.8% CAGR through 2031, driven by hyperscale AI infrastructure investment, escalating power density and cooling complexity, and tightening energy efficiency regulations, creating high-value demand for unified building, power, and thermal management solutions that can deliver PUE optimization, liquid cooling automation, and real-time energy compliance reporting from a single, integrated platform.

2 The estimated 6 million commercial buildings in North America alone that operate without modern building automation, combined with the retrofit demand driven by EU EPBD compliance, CSRD ESG disclosure mandates, and net-zero decarbonization targets across mature markets, represent the largest opportunity in the smart buildings market, accessible to any platform provider that can deliver AI at low deployment friction, minimal upfront capital, and an 18-24-month payback.

3 Asia-Pacific's 16.3% CAGR—the highest of any region and set to overtake Europe in revenue by 2029—reflects a distinct, greenfield-led growth wave across India, Southeast Asia, and China where new commercial, healthcare, hospitality, and data center construction provides opportunities to deploy cloud-native, AI-first building intelligence without legacy BMS constraints, rewarding platform providers that invest in global + local execution models, fit-for-purpose architectures, and local ecosystem partnerships.

Source: Frost & Sullivan

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Frost Radar™ Analytics

Frost Radar™: Benchmarking Future Growth Potential
2 Major Indices, 10 Analytical Ingredients, 1 Platform

Growth Index

Growth Index (GI) is a measure of a company's growth performance and track record, along with its ability to develop and execute a fully aligned growth strategy and vision; a robust growth pipeline system; and effective market, competitor, and end-user focused sales and marketing strategies.

GI1

MARKET SHARE (PREVIOUS 3 YEARS)
This is a comparison of a company's market share relative to its competitors in a given market space for the previous 3 years.

GI2

REVENUE GROWTH (PREVIOUS 3 YEARS)
This is a look at a company's revenue growth rate for the previous 3 years in the market/industry/category that forms the context for the given Frost Radar™.

GI3

GROWTH PIPELINE
This is an evaluation of the strength and leverage of a company's growth pipeline system to continuously capture, analyze, and prioritize its universe of growth opportunities.

GI4

VISION AND STRATEGY
This is an assessment of how well a company's growth strategy is aligned with its vision. Are the investments that a company is making in new products and markets consistent with the stated vision?

GI5

SALES AND MARKETING
This is a measure of the effectiveness of a company's sales and marketing efforts in helping it drive demand and achieve its growth objectives.

Source: Frost & Sullivan

Frost Radar™: Benchmarking Future Growth Potential
2 Major Indices, 10 Analytical Ingredients, 1 Platform (continued)

Innovation Index

Innovation Index (II) is a measure of a company's ability to develop products/ services/ solutions (with a clear understanding of disruptive megatrends) that are globally applicable, are able to evolve and expand to serve multiple markets and are aligned to customers' changing needs.

II1

INNOVATION SCALABILITY
This determines whether an organization's innovations are globally scalable and applicable in both developing and mature markets, and also in adjacent and non-adjacent industry verticals.

II2

RESEARCH AND DEVELOPMENT
This is a measure of the efficacy of a company's R&D strategy, as determined by the size of its R&D investment and how it feeds the innovation pipeline.

II3

PRODUCT PORTFOLIO
This is a measure of a company's product portfolio, focusing on the relative contribution of new products to its annual revenue.

II4

MEGATRENDS LEVERAGE
This is an assessment of a company's proactive leverage of evolving, long-term opportunities and new business models, as the foundation of its innovation pipeline. An explanation of megatrends can be found here.

II5

CUSTOMER ALIGNMENT
This evaluates the applicability of a company's products/services/solutions to current and potential customers, as well as how its innovation strategy is influenced by evolving customer needs.

Next Steps: Leveraging the Frost Radar™ to Empower Key Stakeholders

Significance of Being on the Frost Radar™

Companies plotted on the Frost Radar™ are the leaders in the industry for growth, innovation, or both. They are instrumental in advancing the industry into the future.

GROWTH POTENTIAL

Your organization has significant future growth potential, which makes it a Company to Action.

BEST PRACTICES

Your organization is well positioned to shape Growth Pipeline™ best practices in your industry.

COMPETITIVE INTENSITY

Your organization is one of the key drivers of competitive intensity in the growth environment.

CUSTOMER VALUE

Your organization has demonstrated the ability to significantly enhance its customer value proposition.

PARTNER POTENTIAL

Your organization is top of mind for customers, investors, value chain partners, and future talent as a significant value provider.

Source: Frost & Sullivan

Frost Radar™ Empowers the CEO's Growth Team

STRATEGIC IMPERATIVE

- Growth is increasingly difficult to achieve.
- Competitive intensity is high.
- More collaboration, teamwork, and focus are needed.
- The growth environment is complex.

LEVERAGING THE FROST RADAR™

- The Growth Team has the tools needed to foster a collaborative environment among the entire management team to drive best practices.
- The Growth Team has a measurement platform to assess future growth potential.
- The Growth Team has the ability to support the CEO with a powerful Growth Pipeline™.

NEXT STEPS

- **Growth Pipeline Audit™**
- **Growth Pipeline as a Service™**
- **Growth Pipeline™ Dialogue with Team Frost**

Source: Frost & Sullivan

Frost Radar™ Empowers Investors

STRATEGIC IMPERATIVE

- Deal flow is low and competition is high.
- Due diligence is hampered by industry complexity.
- Portfolio management is not effective.

LEVERAGING THE FROST RADAR™

- Investors can focus on future growth potential by creating a powerful pipeline of Companies to Action for high-potential investments.
- Investors can perform due diligence that improves accuracy and accelerates the deal process.
- Investors can realize the maximum internal rate of return and ensure long-term success for shareholders
- Investors can continually benchmark performance with best practices for optimal portfolio management.

NEXT STEPS

- **Growth Pipeline™ Dialogue**
- **Opportunity Universe Workshop**
- **Growth Pipeline Audit™ as Mandated Due Diligence**

Source: Frost & Sullivan

Frost Radar™ Empowers Customers

STRATEGIC IMPERATIVE

- Solutions are increasingly complex and have long-term implications.
- Vendor solutions can be confusing.
- Vendor volatility adds to the uncertainty.

LEVERAGING THE FROST RADAR™

- Customers have an analytical framework to benchmark potential vendors and identify partners that will provide powerful, long-term solutions.
- Customers can evaluate the most innovative solutions and understand how different solutions would meet their needs.
- Customers gain a long-term perspective on vendor partnerships.

NEXT STEPS

- **Growth Pipeline™ Dialogue**
- **Growth Pipeline™ Diagnostic**
- **Frost Radar™ Benchmarking System**

Frost Radar™ Empowers the Board of Directors

STRATEGIC IMPERATIVE

- Growth is increasingly difficult; CEOs require guidance.
- The Growth Environment requires complex navigational skills.
- The customer value chain is changing.

LEVERAGING THE FROST RADAR™

- The Board of Directors has a unique measurement system to ensure oversight of the company's long-term success.
- The Board of Directors has a discussion platform that centers on the driving issues, benchmarks, and best practices that will protect shareholder investment.
- The Board of Directors can ensure skillful mentoring, support, and governance of the CEO to maximize future growth potential.

NEXT STEPS

- **Growth Pipeline Audit™**
- **Growth Pipeline as a Service™**

Next Steps

Transformation — Ecosystem — Growth Generator — Growth Opportunities — **Frost Radar™** — Best Practices — Companies to Action

JOIN:
Growth Council

APPLY:
Companies to Action

ENGAGE:
Growth Dialog

PARTICIPATE:
Growth Council Think Tank

Does your current system support rapid adaptation to emerging opportunities?

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