

# Where Is The Internet Going?

An analyst I used to follow in my investment days, [Henry Blodget](#), is now an editor for [Business Insider](#), and his own company has been on top of the internet space since the beginning. I like hearing what he has to say because he has had so many years watching the ups and downs of the firms in this space, and he offers good insight into where these companies are going.

*Business Insider* recently held its annual IGNITION conference with great speakers from [LinkedIn](#), [Google](#), [Groupon](#), and [Time Warner](#).

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## Communication Revolution

Back in 1995, when [Robert Loest](#) and I were telling the world about our new [mutual fund IPS Millennium](#), we told a story explaining that, historically, change within a civilization first occurs at an inflection point and is followed by big change and then a long plateau period.

We shared how civilization started with hunter-gathers, and people maintained that lifestyle for over 100,000 years. Then, we had an inflection point, learning to plant seeds and grow food. This was the [Agricultural Revolution of the Neolithic Era](#), and it went on for a few thousand years.

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# Mobile Apps, Change You Can Believe In!

The world is changing quickly. Many times we find ourselves looking up from whatever we were doing and wondering, “Where did that come from? Why are people doing it that way? How does everyone seem to know about this except me?” In the world of the internet, we all stay connected at all times and all locations, so when changes occur, they are downloaded and spread in real time. Some of us simply choose to see it on our own time frame.

Look around when you walk into a restaurant, when you’re waiting in line, when you’re sitting around the airport or subway station.

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## The Value of Connection!

Who are you connected with? What is the value of connection? If you read any of my blogs over a period of time, you could pull out the frequent topic of connectivity. So why is it such a major theme? Even marketing guru [Seth Godin](#) discusses the importance of connecting in his recent blog “[First, connect.](#)” Let’s take a look back at a little science and history, and then we will come back to how it is relevant in business.

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# Real Commerce With Mobile!

In last week's [blog](#), we discussed how we are entering the Web 3.0 world. That world consists of mobile. We talked about creating real value for customers and real commerce for merchants. I recently came across some really great examples of this in an article called [Web 3.0: The Mobile Era](#) written by [Jay Jamison](#), who has a venture company that invests in early stage mobile companies.

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## 4 Billion New Customers!

Think about that! If you had access to 4 billion customers, how would that impact your marketing, your strategy, your vision, your opportunities, and your profit potential? Well it's coming, and I see it happening right before my eyes.

Let me back up for a moment and give you some perspective. As I write this, I am at my office in Pondicherry, India. I started [Efficiency](#) with my partners April and Rich back in 2004 and came to India shortly after to set up the office. We started with one full time team member and one intern and then quickly added five more. We have now grown to 40 bright, enthusiastic, hardworking men and women.

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# Mobile Takeover

When you look at the aspects of positioning yourself in business, think about where the world is going and where you should be to set yourself in its path. Easier said than done, right? How does one know where the world is headed? The answer is to take in as much information as you can that provides the clues to where things are going. Back in my investment days, I spent a lot of time reading research reports and other material that discussed future technologies and trends.

I used to follow an internet analyst named [Mary Meeker](#) of [Morgan Stanley](#).

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## The Mobile Future is Right Before Our Eyes!

Last week, I traveled to Dallas, TX for a guys' weekend with my son Tony, his close friend Steven, and my brother Mark. While there, we also attended the Bills vs. Cowboys football game. Having grown up in Rochester, NY, I am a Bills fan, which is often difficult to endure. That weekend was no exception. Even after a great start to the season, the Bills lost 44 to 7. Other than that, we had a great time, and the Cowboys' stadium is off the charts!

You seem to open your eyes more to what is around you when you're in a new environment, so being a bit more observant, I watched the nonstop mobile usage around me. These observations made me want to share some recent research that has been released. Based on the research and my own thoughts, mobile

devices are becoming a powerful force in our lives.