

Market Insight

A Guide to the Education Industry for Wireless Broadband and Two-Way Channel Partners

Answering the call for critical solutions

Education entities across the country constantly struggle to meet a wide range of needs for students with limited, even decreased, funding. Now more than ever, schools rely on technology to support management, student communications and e-learning initiatives, and even use it to attract new students. Keeping up with technology trends that adequately serve students and ensure their safety is challenging, but vital today and in the future. Motorola two-way radio and wireless broadband solutions present simple, effective answers to many of these important challenges.

Source: Compass Intelligence, May 2008

QuickFact

Emergency preparedness is still a concern, and the adequacy of school readiness is still a question. While many schools have plans drafted, most have never been tested or integrated with local public safety officials.

Source: School Safety Congressional Testimony by Kenneth Trump, May 2007 www.school-security.org

The trend toward technology

Learning enhancement

Educators are looking to technology to encourage personalization of learning and to enhance all aspects of learning.

- Handheld communication devices are being used regularly to increase efficiency and improve processes for teachers campus-wide.
- A broadband network enables more technology-enriched learning experiences that support No Child Left Behind requirements for improved instruction and higher student achievement.
- Wireless broadband solutions also enhance connectivity, communication, interactivity and collaboration for students, faculty and administrative leadership and staff.

Safety and security

Technology is becoming a crucial component in securing school campuses from physical and network threats.

- Communication devices such as two-way radios help address rising safety concerns, from the classroom to the bus stop to the football field.
- Surveillance and security are now being implemented over IP and over mobile networks in places such as parking lots, general gathering areas, and in recreational/sports facilities.

Source: Compass Intelligence, May 2008

Opportunities

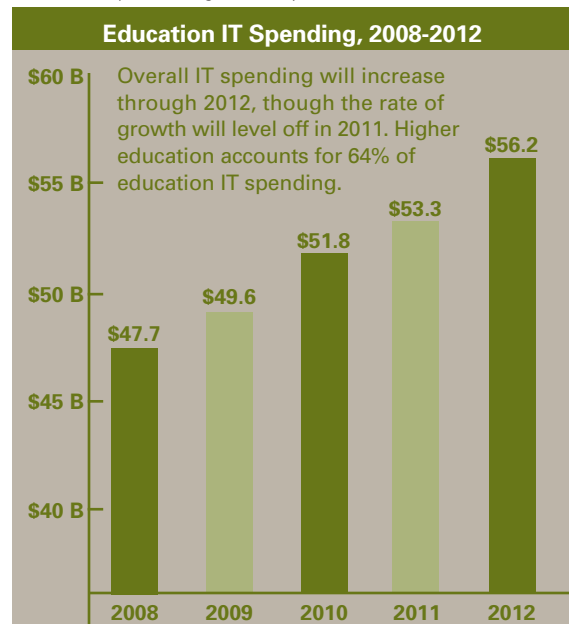
According to the American Association of School Administrators, schools across the nation are facing serious financial obstacles with the majority of K-12 superintendents reporting their districts to be "inadequately funded." Despite this sobering news, 74% of educational entities plan to maintain or increase technology buying activity in 2009, down from 86% in 2008 projections.

Source: Onvia Government Market Outlook 2009

Growth projections

Total IT spend in education is expected to have a three- and five-year compounded annual growth rate (CAGR) of 4%.

Source: Compass Intelligence, May 2008



Source: Compass Intelligence, May 2008

ShopTalk

According to a 2007 survey of education end users:

- **56%** made their last two-way radio purchase within the last three months.
- **40%** purchase radios two or more times per year.
- **30%** stated service/support were the top reasons why they chose their primary brand (brand used most often)
- **50%** indicated quality was the most important attribute when purchasing two-way radio equipment.

Source: Motorola

QuickFact

Access and communications were two areas that the 355-student Weston School District in Wisconsin focused on in the wake of a tragedy last September 29. "It would have been good to be able to communicate in some places we couldn't communicate," said Acting Superintendent Tom Andres. "They were just in lockdown for the two hours not really knowing what was going on." To improve communication, the district bought 16 two-way radios, adding to the six they originally had, and expanded the radio coverage to include all areas of the property.

Source: May 2007 District Administration Magazine

Wireless spend growth

- Wireless technology was expected to account for \$13 billion in education IT spending in 2008, or about 27% of the total forecast.
- More than half of higher education campuses are currently using wireless, and some 35% of total K-12 schools are using or are expected to be using wireless by the end of the year.

Source: Compass Intelligence, September 2008

Industry issues

Educational entities are constantly faced with internal and external obstacles that can inhibit the delivery of quality education to students.

Key issues faced in the education sector

- Rising costs, tighter budgets
- Safety and security concerns
- The growing focus on incident prevention
- Staffing turnover
- Streamlining administrative operations
- Keeping up with technology
- Student recruitment and retention

Motorola solutions

Education + Motorola

Many of the challenges facing the education industry can be addressed by improving communications in the schools. Motorola two-way radios and accessories and wireless broadband are rooted in superb technology and innovation that provide a dependable and effective solution.

The case for two-way radios

Versatile and easy to use, Motorola two-way radios provide the immediate communications tool to help maintain order, manage operations, and enhance student safety.

Voice and data integration

With the integration of voice and data, Motorola digital radios can cut through the noisy backdrops that can be common at schools. Noise suppression technology can limit background noise, and text messaging capabilities enable discreet communications or an alternative when voice communication is not possible.

Emergency notification

Teachers, bus drivers, crossing guards and coaches can take immediate action when disturbances or emergencies occur. Motorola radios include emergency call features to alert a safety or security team.

Campus security

Security staff can program MOTOTRBO™ radios to receive an alarm text message when an emergency door is opened, and radios allow you to retrieve and send critical messages on the move, wherever you are in the building.

Incidence prevention

One-to-one or one-to-many calling alerts school security to potentially dangerous or suspicious situations. Radios allow all equipped personnel to keep in contact and aware of developing situations—speeding response and improving safety and incident prevention. Radios also provide excellent communications for buses traveling out of district to sports events or field trips.

Instant tracking capabilities

With an integrated GPS modem in MOTOTRBO, school officials can track the location of school vehicles, including the whereabouts of a child on a bus ride home.

Productivity and efficiency

Staff can efficiently manage school bus loading and unloading, large assemblies, cafeterias and sporting events with ease. Radios clip on the belt for hands-free productivity.

Scalable technology

Motorola continues to bring new applications to our radio solutions, enhancing return on investment. A wise investment in radio infrastructure today can adapt and integrate technology enhancements in the future.

Easy to use

Simple to operate and with lightweight, compact designs, two-way radios are easy to use and won't get in the way of daily tasks.

Long work shifts

MOTOTRBO offers enhanced battery life to work through long work shifts as digital TDMA radios can operate up to 40% longer between recharges compared to typical analog radios. And with Motorola's state-of-the-art IMPRES™ energy technology, the battery and charger communicate to automate battery maintenance—resulting in radios that are charged and ready to go whenever needed.

Case study:

Cross campus solution

Customer: Cincinnati State Technical and Community College

Goal: Communications system that would give clear coverage over three campuses spanning 1.3 million square feet, and cost-effectively accommodate multiple talk groups.

Challenge: Enhanced communication and a supervisory channel that would provide the flexibility for critical security personnel to communicate during times of crisis.

Solution: MOTOTRBO complete system of mobile and portable units, repeater, data applications and easily adaptable accessories.

Results: Communication at a greater distance and different channels for internal operations. The system also supports a lower cost of ownership and proved to be an incredibly smooth transition.

TechTalk

The percentage of college classrooms across all sectors that have access to wireless networks continues to rise, according to the 2008 National Survey of Information Technology in U.S. Higher Education.

- During 2008, wireless networks reached 67.6% of U.S. college classrooms.
- Access is highest in private universities at 76%, and lowest in community colleges at 56.1%

The case for wireless broadband

Motorola broadband solutions help to enhance the learning experience, reduce costs, improve communications, comply with government mandates and tighten security.

Ubiquitous connectivity

Wireless networks allow speedier access to research, online repositories, learning portals, course management systems and supports faster campus-wide communications in emergency situations. It also enables anywhere, anytime learning, which is a huge selling point for potential students.

IT security

Motorola wireless broadband solutions use the latest in Wireless Intrusion Protection technology to both maximize network security and facilitate easier, quicker troubleshooting and technical support for schools' IT staff.

Campus safety

State-of-the-art IP-based video surveillance helps monitor perimeters, parking lots, dormitories and other hard-to-reach campus locations—from a security room or in the field—with a handheld device or laptop. Integrate IP-video surveillance with existing video and access-control systems for one comprehensive solution.

Productivity and efficiency

Wireless broadband solutions improve administrative productivity and reduce costs by enabling advanced applications such as online class registration, electronic grading, data collection, access to student transcripts, billing procedures and much more.

Return on investment (ROI)

Wireless broadband networks can be installed quickly at a fraction of the cost of traditional wired networks, and provide a higher throughput alternative to leased land lines with no recurring cost. Wireless networks also enable the deployment of other cost-reducing technologies, such as voice over wireless LAN, which can realize, on average, an ROI within 6 to 12 months.

Revenue building

A broadband network also offers numerous opportunities for colleges and universities to create new profit centers and add new revenue streams.

Flexible/scalable

A Motorola wireless solution offers the scalability you need to meet your network demands today—and tomorrow—providing seamless indoor/outdoor wireless connectivity.

Case study:

High school solution

Customer: San Marino Unified School District

Goal: High-speed wireless local area network (WLAN) connectivity, campus-wide mobility, multi-user streaming multimedia capabilities, and the need for a forward-looking network in terms of standards and performance.

Challenge: Keeping up with the rapid growth of Internet-based educational resources such as streaming multimedia content, and the huge increase of student wireless laptop computers, phones and other devices.

Solution: Motorola 802.11n WLAN

Results: Reliable high-speed campus-wide coverage that reduced future costs and was advanced enough to meet future needs.

Understanding the customer

There are countless ways in which Motorola solutions can benefit schools of all types, but how do Channel Partners deliver this message? Start by learning who the decision makers are and what factors most likely affect their decisions.

Decision makers

Know your audience. The decision makers for purchases at an educational institution will vary based on the type of product, the size of the district, school or university and structure. Also, enterprise-wide solutions vs. single solutions have differing decision makers.

Two-way radios:

Small college/universities:

- Chief/director of security
- Director of facilities and operations
- Telecom manager
- Maintenance manager

K-12 schools:

- Principal/assistant principal
- Superintendent
- School board
- District IT manager
- Maintenance or transportation director
- Athletic director

Wireless broadband:

Enterprise-wide solutions are reviewed by:

- Chief information technology officer (CITO)
- IT manager, finance/CIO
- Director of telecommunications
- Director of facilities
- Director of security
- Administrator
- Dean of students
- School board

A matter of timing

Customer buying cycle

It's important to know your customer's calendar and how it influences the timing of purchase decisions.

Survey Results

According to a 2007 survey of education end users:

- **80%** made their most recent two-way radio purchase from a dealer or distributor.
- **70%** have a 7+ year relationship with their supplier of choice.
- **80%** were "Very Satisfied" with their supplier of choice.
- **66%** used the dealer or distributor as a source of two-way radio information, followed by websites at 32%.

Single-solution decisions can be made by the entity requiring the solution, i.e., many private campus security departments have their own budget for those areas solely managed by police. Surveillance often does not rest under one umbrella on campus.

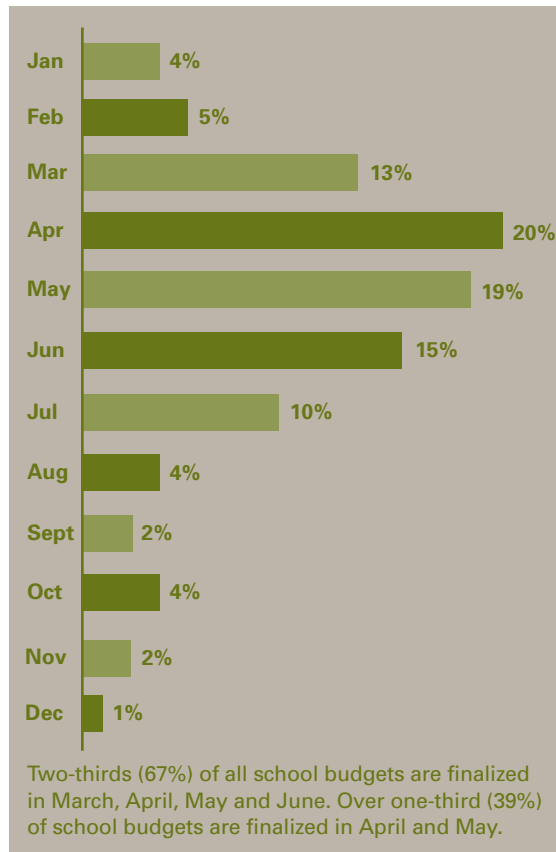
K-12 buying cycles

Most school district buying cycles are a multi-phase, year-round process with year-to-year cycles that overlap. That's why it's critical to contact district leaders throughout the year.

It's also important to remember, each school district sets its own schedule, and some districts operate with no schedule at all. Plus, most school districts do not consider their buying cycles "set in stone."

However, keep in mind:

- The biggest months for finalizing budgets are in March, April, May and June.
- Nearly 40% are finalized in April and May.



Source: Quality Education Data, Q4 2008

Many districts rely on Federal E-Rate funding for their networking and Internet service projects, which adds another layer of bureaucratic delay onto an already long purchasing cycle. E-Rate projects require that a school develop a technology plan, competitively bid the project, request funding during a specific window of time during the winter, and then proceed with the project once funded. The sales cycle for such projects is nearly a year.

Only certified vendors and service providers can bid on these projects, so becoming certified with the E-Rate program is an essential step for Motorola channel partners.

Higher education buying cycles

Public universities' buying cycles depend heavily on the budget cycles of the states they reside in, which all differ. The majority operates on annual budgets, which are usually set in the spring, but some have biennial budget cycles that can begin at differing times of the year. Consequently, all situations should be handled uniquely and researched beforehand.



Motorola is a corporate sponsor for the International Association of Campus Law Enforcement Administrators (IACLEA). The logo can be used in any printed and electronic materials through June 30, 2009, to showcase Motorola's strength as a partner.

Suggested use of the IACLEA logo:

- Include the logo in Microsoft® PowerPoint® presentations given to educational customer.
- Include the logo in printed or electronic promotions or messages to the educational market.
- Use the logo as part of your signature line in email messages.
- Use the logo to indicate your support of the IACLEA organization and its members.
- The logo validates our corporate partnership to an organization for which your customer is a member and supports.

Inappropriate use of the IACLEA Logo:

- Indication or implied sponsorship of your specific customer solution.
- Indication or implied certification, approval, or purchase acceptance of your specific customer solution.
- Indication or implication that the material that includes the logo was created, presented or approved by IACLEA.

Please utilize the IACLEA Corporate Partner logo to your greatest value and customer sales benefit. If you have any questions regarding the use of the logo or the Motorola corporate partnership relationship, please contact:

Marie White at AMW110@motorola.com or (847) 576-9972

John Jaderholm at John.Jaderholm@motorola.com or (847) 538-0767

Starting at the source

Customer buying preferences

Decision makers in the education industry must meet a multitude of needs in a numerous categories, so each purchase must be prioritized and examined carefully. Channel partners should be familiar with the sources that influence buying patterns such as consultants, analysts, and industry peers, associations and publications.

Funding models

As educators consider equipment purchases, the funding model will be a factor in the final decision to buy. Channel partners should know:

Budget ownership

- Which person in the organization has responsibility for the purchase decision?
- Which person in the organization stands to benefit directly from the purchase (this may be different from the purchaser)?
- What other projects or priorities are competing internally for the budget, and who is championing those priorities?

Budget source

Funds for their purchase will likely come from one of the following sources:

- Emergency response and crisis management grants
- U.S. Homeland Security
- State grants
- E-rate funding

More information:

Learn more about the education industry or Motorola solutions at these websites:

- Regulatory organizations
 - Commission on Accreditation of LE Agencies (CALEA), www.calea.org
- Industry associations
 - National Association of College and University Business Officers (NACUBO), www.nacubo.org
 - American Council of Education (ACE), www.acenet.edu
- Industry publications
 - District Administration, The Magazine for K-12 Education Leaders, www.districtadministration.com
 - The Chronicle of Higher Education, www.chronicle.com
- Motorola websites
 - www.motorola.com/education
 - www.motorola.com/wirelessbroadband/education



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