

**INPUT's
Eleventh Annual
Executive
Conference
for Information Services
Vendors and Users**

October 23-25, 1989
Mark Hopkins Hotel
San Francisco, California

**GLOBALIZATION
OF
INFORMATION
SERVICES
MARKETS**

**Strategic and Tactical
Planning Information**

Markets Analyzed

- Software Products
- Systems Integration
- Professional Services
- Network Services
- Processing Services
- Turnkey Systems

INPUT



Globalization of Information Services Markets

KEY BENEFITS OF ATTENDING THIS CONFERENCE

- Begin to plan for the growth of information services in the coming decade.
- Understand the size and growth rate of your target markets.
- Identify major trends and driving forces within your target markets.
- Identify and profile leading users and vendors in all market segments.
- Superb opportunity for informal discussion with your peers and INPUT consultants.
- Identify information opportunities

WHO SHOULD ATTEND?

- ☞ Presidents of software and services companies
- ☞ Vice-presidents of sales and marketing
- ☞ Directors of strategic planning
- ☞ Mergers and acquisitions managers
- ☞ Chief Information Officers
- ☞ Information Services Directors

CONFERENCE SUMMARY

Vendors of information services, as well as users of those services, face many challenges in the coming decade. Increasing competition in all market sectors, rapid globalization of product requirements and marketing strategies, continuing mergers and acquisitions by major players, and the increasing rate of technological innovation make intelligent market planning and analysis mandatory for all participants.

The INPUT Executive Conference is based on significant primary research, and provides vital planning information for senior staff of Information Services vendors, and Information Systems Managers and CIOs in user organizations. INPUT's consultants will present analyses and forecasts on many pertinent subjects, including:

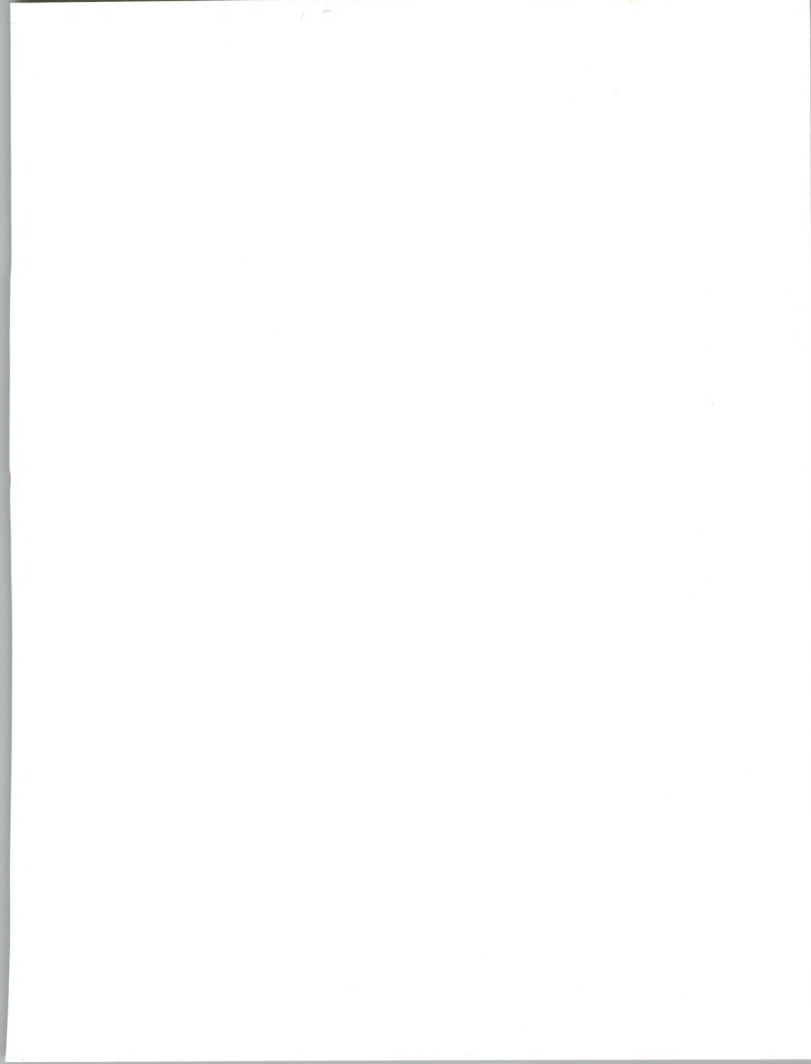
- Globalization of information services markets
- Major trends, issues, opportunities, and vendor strategies
- Worldwide and US five-year forecasts
- New developments in mainframe-micro connectivity
- Systems integration markets, forecasts, and trends
- U.S. Federal Government markets
- Electronic data interchange
- "Demassification" in manufacturing industries
- UNIX software markets
- Merger and acquisition strategies
- Pacific Rim information services markets
- Information systems management in the 1990s

The 3-day conference will examine all these topics and more. The conference provides crucial information on strategic opportunities, driving forces, issues, trends, vendor strategies, and market shares. For market positioning and competitive response during the 1990s, this INPUT conference can be invaluable.

INPUT'S CREDENTIALS

Planning for the future is an INPUT specialty and a constant focus. INPUT's forecasts and analyses of information services markets are part of the most comprehensive and timely planning service available anywhere.

For 14 years, INPUT has focused exclusively on the information services industry, and has built expertise and data bases that are major assets to our clients. INPUT senior consultants have all held high-level management positions in the industry, and are able to analyze and synthesize specific events into the broader context of a worldwide industry environment. INPUT conclusions and recommendations to clients are based on the real-world experience of the consulting staff, plus our primary research and proprietary data bases, and unique methodology.



CONFERENCE AGENDA CONTINUED

discusses leading vendors and their strategies, the likely incorporation of AI into mainstream applications, and predicts future directions in AI evolution.

■ **UNIX Software Markets**
Bruce Hadburg reviews the dynamic UNIX software market, reporting from a recent INPUT

study. Industry associations, vendor alliances, and equipment manufacturers all impact this market. Strategies of major vendors, market trends, and future market directions are discussed.

■ **Systems Operations (Facilities Management) Markets**—Bob Goodwin analyzes this mature market's renewed growth cycle.

Opportunities for revenues and "account control" are emerging as large-system users choose third party management of their computers.

3:30-6:00 *Free Time*

6:00-7:00 *Cocktail Reception*

7:00 *Free Evening*

Wednesday, October 25, Day 3

7:30 *Continental Breakfast*

8:30 **U.S. Software Products Markets.** Mary Raymond, INPUT Program Manager for Vendor Analysis, discusses software product market forecasts, trends, leading vendors, IBM strategies, and the impact of technology drivers such as 4GL, CASE, networking, RDBMS, and image processing.

9:15 **Pacific Rim Information Services Markets.** Bob Goodwin reviews information services opportunities in the world's

fastest-growing region for these services—the Pacific Rim, including regional forecasts, and discusses the political, economic, and technology environments and strategies for market entry.

10:15 **Third-Party Software and Vendors.** Mark Blanchard, IBM Corporation, describes IBM's current programs for third-party software vendor relationships.

11:00 **Information Systems Management in the 1990s.** Dennis Wayson presents results from INPUT's research into the

information systems management/CIO community. The changing role of the CIO in the next decade will be discussed, the likely environment IS managers will face during this period, and trends in budget allocation and resource utilization.

12:00 **Conclusions and Wrap-Up.** Bob Goodwin presents conclusions to the 1989 conference and offers an early look at INPUT's 1990 research program content.

12:00 *Adjourn*

GLOBALIZATION OF INFORMATION SERVICES MARKETS

October 23-25, 1989, Mark Hopkins Hotel, San Francisco, California

CONFERENCE REGISTRATION

INPUT advisory service clients: two persons per program may attend at no charge. Additional attendees from the same company are charged \$495 ea.

Companies not subscribing to INPUT services:

- First attendee from a company\$1395
- All additional attendees\$995

PAYMENT AND CANCELLATION POLICY

You may cancel your reservation without a 25% cancellation fee until October 9. Cancellations must be in writing. INPUT will consider purchase order numbers or company checks as proper reservations. Credit cards cannot be accepted. INPUT reserves the right to make changes to this conference without notice.

ACCOMMODATIONS

The Mark Hopkins Hotel is one of San Francisco's traditions, with a reputation for elegance, style, and comfort. Ideally located on Nob Hill, "the Mark" is close to restaurants, shopping, business, nightlife, and recreational activities.

Hotel reservations may be made by calling the Mark Hopkins directly at (415) 392-3434. Be sure to ask for the INPUT Conference special rate. Available rooms may be taken quickly, so please contact the hotel promptly.

REGISTER TODAY! CALL

415-961-3300 or mail or fax the business reply card today!

FAX: 415-961-3966

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CONFERENCE AGENDA

Monday, October 23, Day 1

7:30 a.m. *Registration and Continental Breakfast*

8:30 **Introduction, INPUT Methodology.** Bob Goodwin, INPUT VP, describes the methodology and research techniques used in preparing conference forecasts and analyses.

9:00 **Keynote: Globalization of Information Services Markets.** Peter Cunningham, INPUT President, discusses the rapid development of a global market for information services and recommend appropriate actions for vendors interested in worldwide presence.

9:45 **U.S. Information Services Forecasts, 1989-1994.** Bob Goodwin presents a summary of INPUT's 1989 forecast for all service delivery modes. Market revenues, growth rates, and leading vendors will be discussed. Fifteen vertical markets will be covered.

10:45 **Demassification of Manufacturing.** Mel Stuckey, Chairman and CEO of Fourth Shift Corp., describes the trend toward demassification/decentralization

of manufacturing operations. As manufacturers struggle to increase productivity, reduce costs, and improve quality, the availability of distributed, networked information systems is fueling demassification. Mr. Stuckey defines demassification, who is doing it, and its implications for vendors and users.

11:30 **Systems Integration Markets.** Doug Wilder, INPUT Program Manager for Systems Integration, presents trends, events, vendor strategies and alliances, and recommendations in the fastest-growing information services delivery mode. INPUT, the first market research firm to identify SI as a major market, has tracked its development for 3 years.

12:15 *Luncheon*

1:30 **Suppliers/Resellers.** George Starr, from Digital Equipment Corporation, discusses Digital's programs for software suppliers and value-added resellers.

2:30-4:00 **Concurrent Roundtable Sessions**

■ **European Information Services Markets.** Peter Lines, INPUT Director, European Research,

describes information services markets, the environment for each major country, implications of the 1992 trade barrier removal, and recommendations to vendors considering expansion into Europe.

■ **U.S. Federal Government Markets—**John Frank, INPUT VP for Federal Programs, leads a discussion of U.S. government information services spending, forecasts, growth rates, vendors' opportunities, and trends in this key vertical market.

■ **Electronic Data Interchange—**Torrey Byles, INPUT EDI consultant, leads a discussion on EDI markets, growth, issues, leading vendors and their activities, and future directions in this dynamic field.

4:00-5:30 *Free Time*

5:30-6:30 *Cocktail Reception*

6:30 *Board Bus for Dinner Cruise*

7:15-10:30 *Dinner Cruise—San Francisco Bay*

Tuesday, October 24, Day 2

7:30 a.m. *Continental Breakfast*

8:30 **Mergers and Acquisitions in the Information Services Industry.** Mary Raymond, INPUT Program Manager for Vendor Analysis, presents results of INPUT's 1989 M&A study focusing on strategies of major players, probable changes to industry structure, preferred acquisition methods, historical results, and the outlook for continuing "merger mania".

9:30 **Professional Services Markets, 1989-1994.** Bruce Hadburg presents INPUT's views

and forecasts for this important market segment, including strategic alliances, mergers, service/product expansion, market position and share, and overlap with systems integration vendors and projects.

10:30 **The Mainframe-Micro Connectivity Revolution.** Al Berkeley, President, Rabbit Software, discusses recent development of powerful, high-functionality software that make connectivity a reality, not just a buzzword.

11:30 **Turnkey Systems Market** George Kellar, ASK Computers, reviews the outlook for VARs and turnkey systems in the 1990s from the perspective of ASK's position as a leading VAR in manufacturing markets.

12:30 p.m. *Luncheon*

2:00-3:30 **Concurrent Roundtable Sessions**

■ **Artificial Intelligence Markets—**Dennis White, INPUT Director of Custom Research, presents recent research findings on the fast-growing AI segment,

