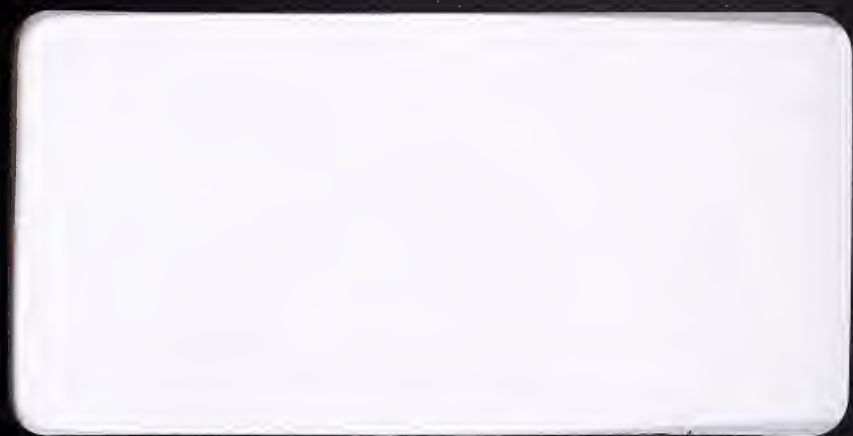


Client Meeting  
Oberstötzingen

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# Client Meeting Oberstötzingen

29 September 1993

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Prepared by  
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### **Customer Services Programme—Europe**

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# Environmental Services

---

## From Cabling to Premises Management

CSP-ML- A1

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Notes

# Environmental Services

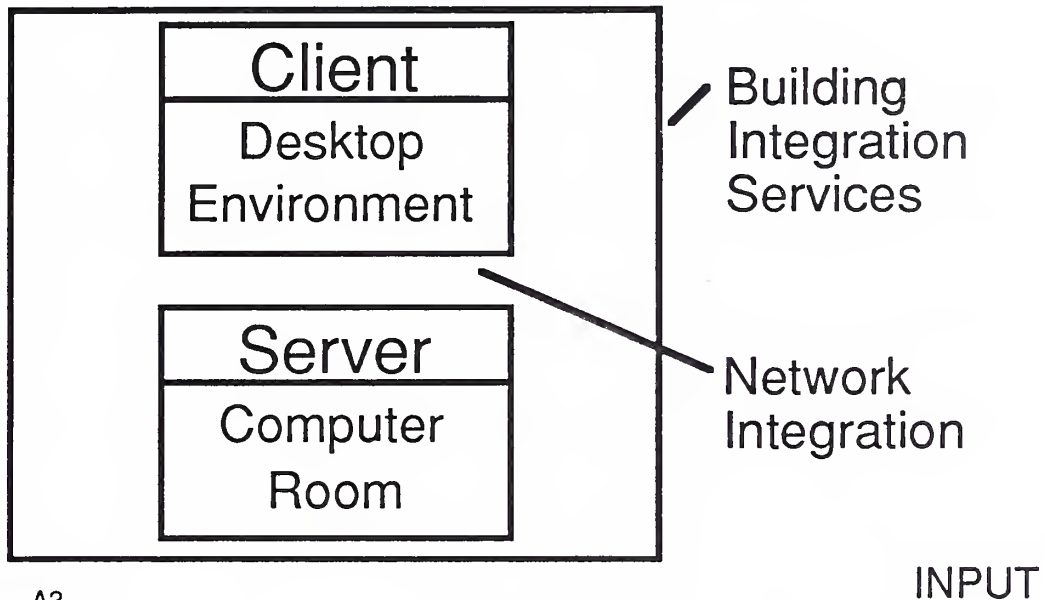
- Affect “environment”
- Computer room
- Cabling
- Power, air conditioning, etc.
- Network
- Buildings

CSP-ML- A2

INPUT

Notes

# Modular Environment



CSP-ML- A3

Notes

Environmental Services

## Market Drivers

- Recession
- Growth of workplace technology
- Networking
- User outsourcing trends

CSP-ML- A4

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Notes



## Environmental Services

# Market Inhibitors

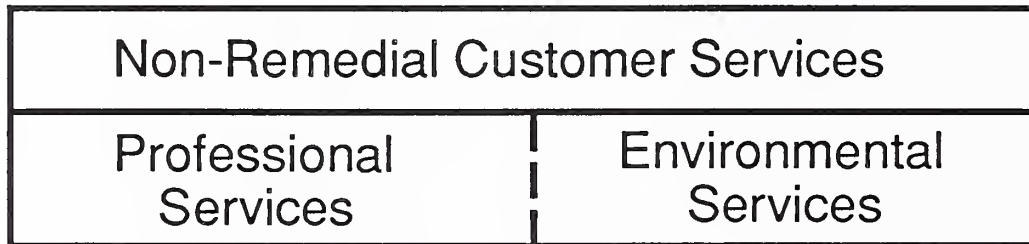
- Use of in-house resources
- Downsizing—in first wave
- Lack of user awareness
- Standards—too many/too few

CSP-ML- A5

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Notes

# Market Segmentation



- ↓
- Consultancy
  - Design
  - Project mgmt.



- Computer room
- Cabling
- Power/Light/etc.
- Installations

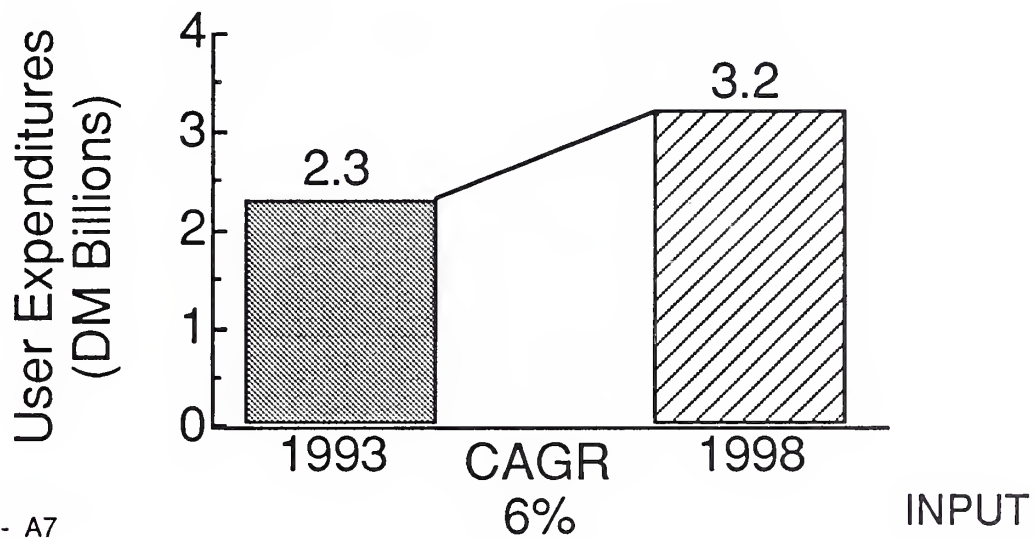
CSP-ML- A6

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Notes

## Environmental Services, Germany

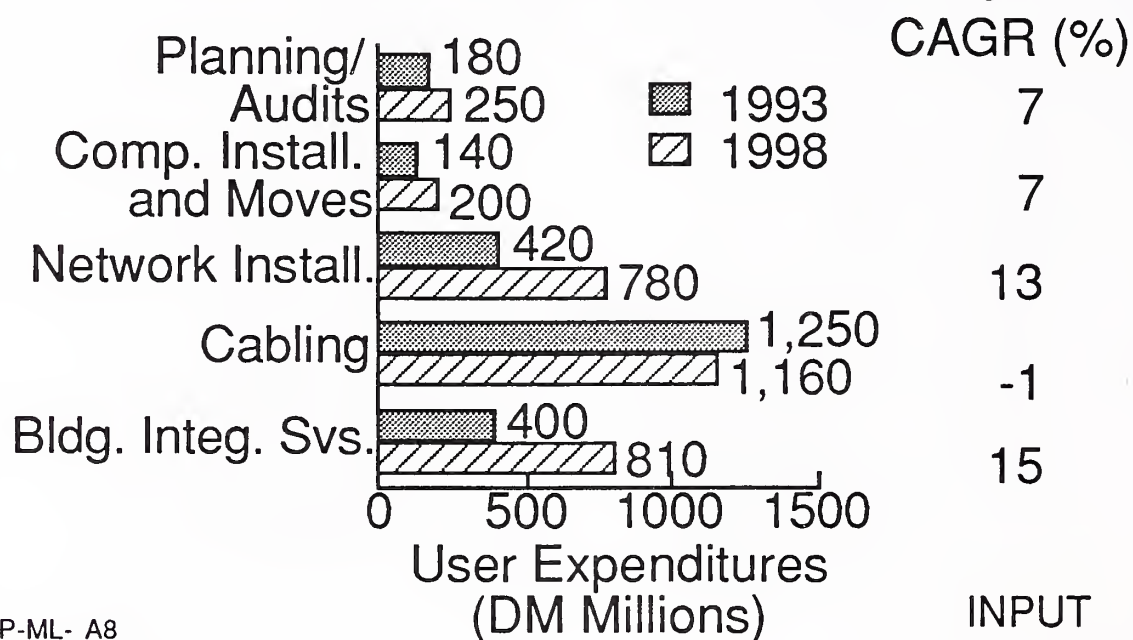
# Market Growth



CSP-ML- A7

## Notes

# Sector Growth, Germany



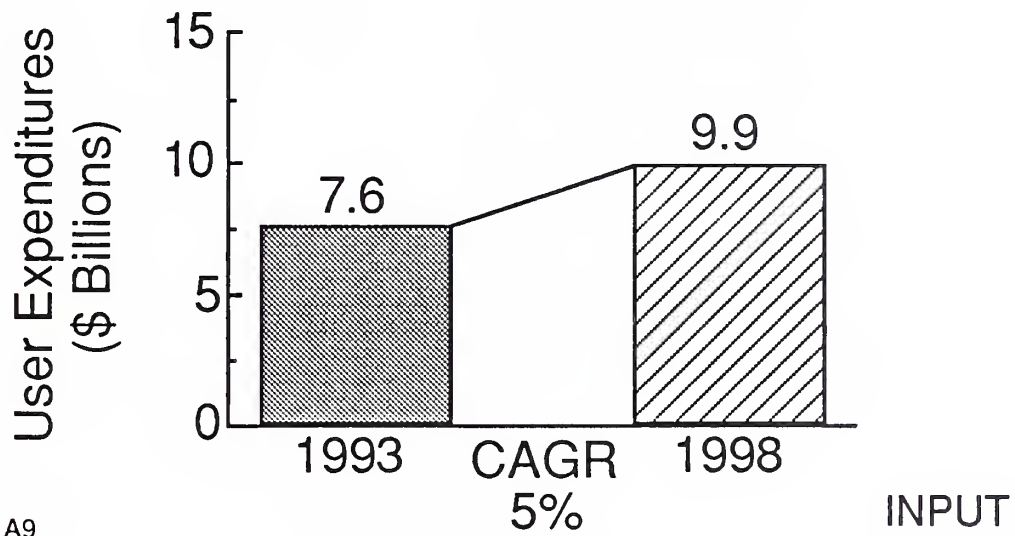
CSP-ML- A8

Notes



## Environmental Services, Europe

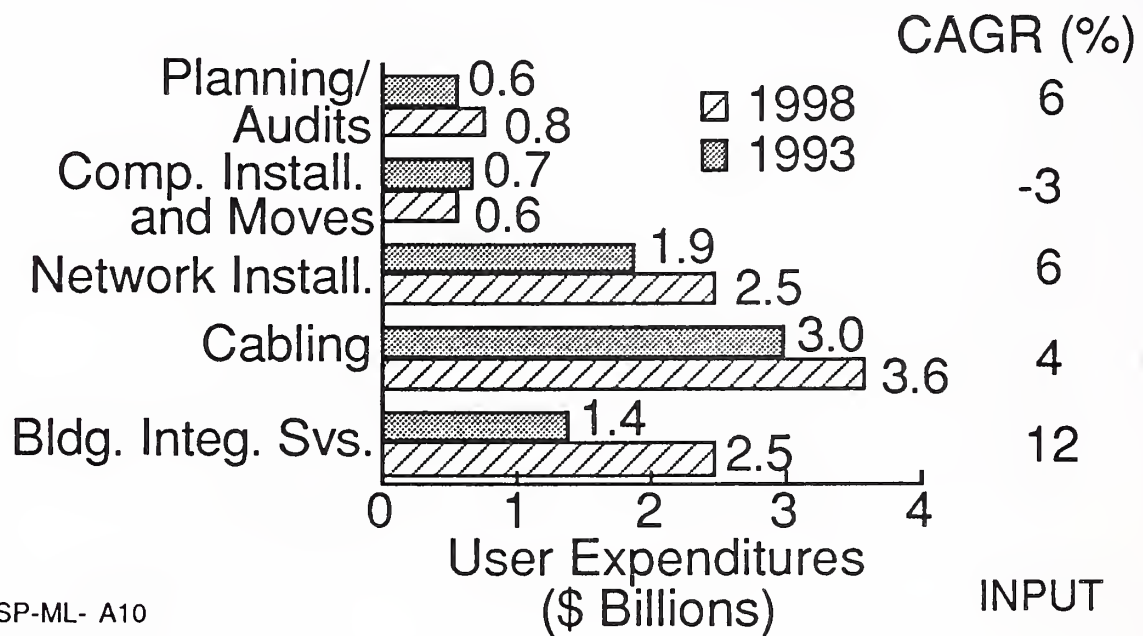
# Market Growth



CSP-ML- A9

Notes

# Sector Growth, Europe

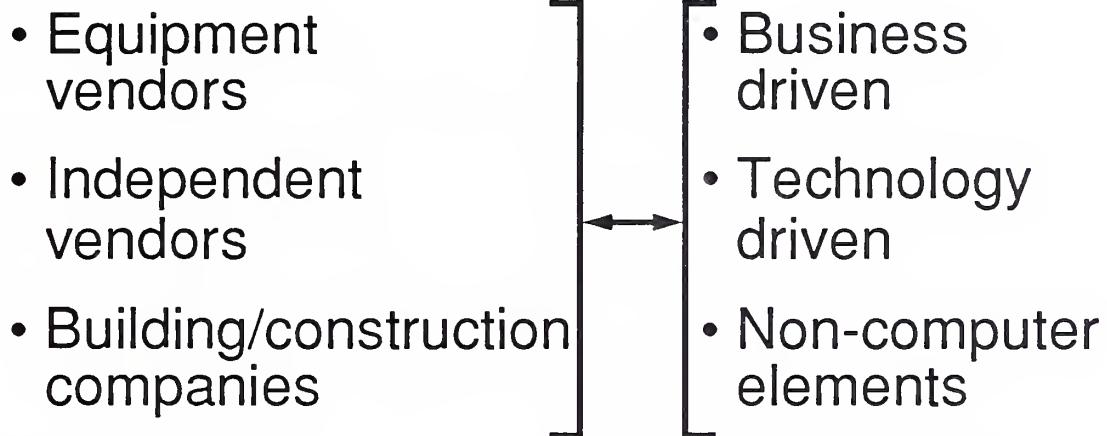


CSP-ML- A10

Notes

# Competitive Environment

## Fragmented Market

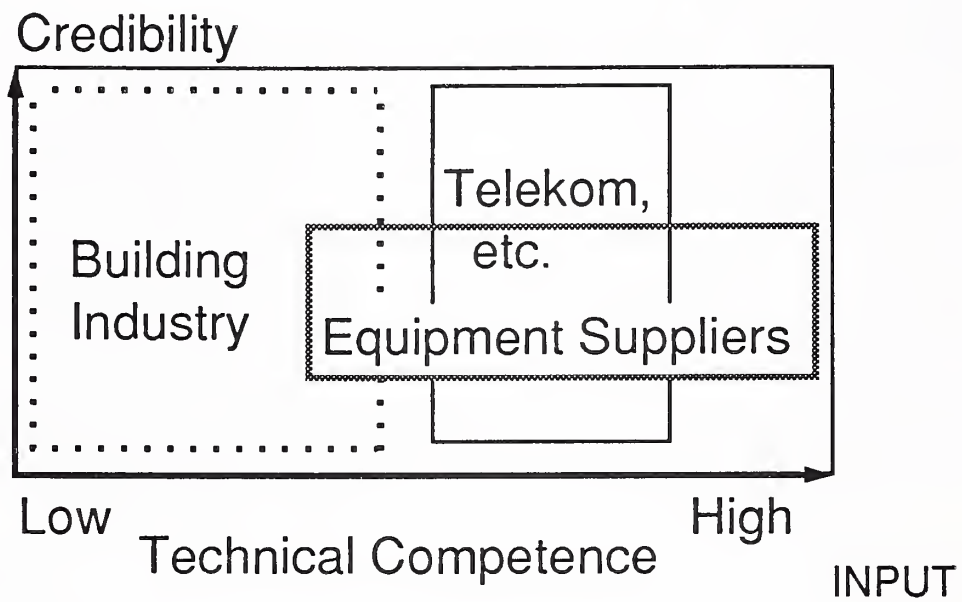


CSP-ML- A11

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Notes

# Vendor Positioning



Notes



# Competitors—I

Equipment  
Vendors



CSP-ML- A13

INPUT

Notes

# Competitors—II

Independent  
Services  
Vendors



CSP-ML- A14

INPUT

Notes

# Competitors—III

Large  
Construction  
Companies



CSP-ML- A15

INPUT

Notes

# Competitors—IV

Specialist  
Building  
Services  
Consultant



CSP-ML- A16

INPUT

Notes



# Competitors—V

Industrial  
Controls  
Systems  
Vendors



CSP-ML- A17

INPUT

Notes

x

## Environmental Services

# Key Findings

- Need for vendor service not identified by over 50% of IS department users
- Fragmentation a key issue
- Need to specialise, then integrate

CSP-ML- A18

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Notes

# Desktop Services

- An outsourcing sector
- Combination of support and upgrade
- Range of approaches
- German interest increasing with client/server

CSP-ML- B1

INPUT

Notes

# Traditional Desktop—Unitised Services

- PC supply
- Network/server
- PC/printer maintenance
- Installation
- Training



CSP-ML- B2

INPUT

Notes



# New Generation Services—In Combination

- ASP supply/support
- Help desk selection/supply
- Problems management
- Planning/administration
- Network upgrades
- Application development

CSP-ML- B3

INPUT

Notes

# User Needs, General 1992-1995

- Acquire skills
- Stimulate end-users
- Upgrade the base
- Establish tools and methods
- Manage network
- Prepare an architecture

CSP-ML- B4

INPUT

Notes

# User Needs, External 1992-1995

- Acquire client/server expertise
- Obtain messaging tools
- System integration
- Network management tools
- Better maintenance contracts
- Accounting and security tools

CSP-ML- B5

INPUT

Notes

# Selection Criteria

- Network expertise
- Single supplier
- Up-to-date
- Independence
- Pan-European

CSP-ML- B6

INPUT

Notes

# Digital's Service Offering

- Among services for technology
- 4 service lines currently
- Mix and match approach
- Sales - Force
  - DECdirect

CSP-ML- B7

INPUT

Notes



# Hewlett-Packard's Service Offering

- Standard contracts
- Multivendor—including 3rd-party software
- Consultancy/customisation
- Specialist groups deliver

CSP-ML- B8

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Notes

# ComputerVision Service Offering

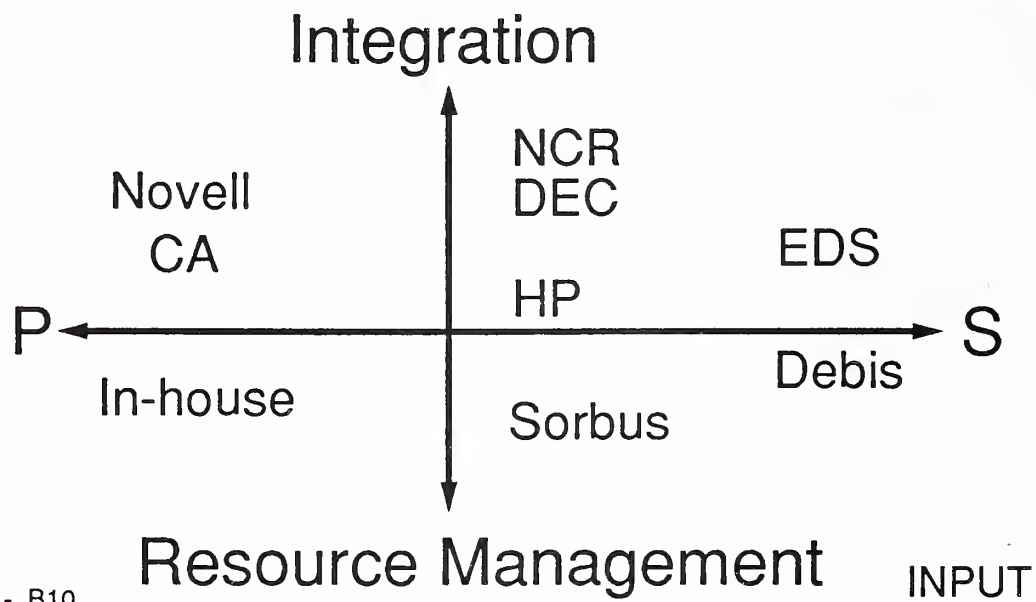
- Network planning/design
- Single-source 'Desktop'
- Standard supply/maintenance
- Open label
- Linked to Life-Cycle

CSP-ML- B9

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Notes

# Vendor Positioning

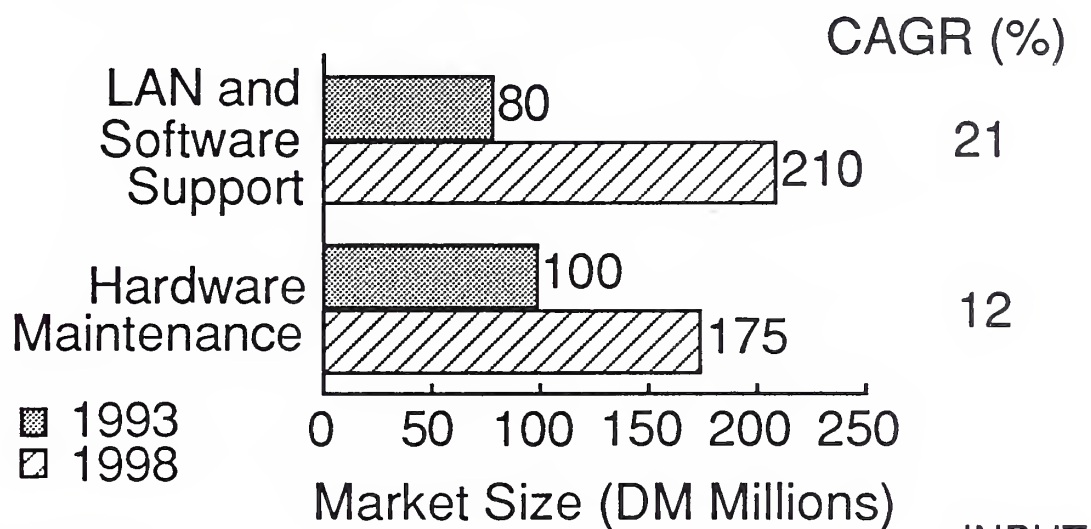


CSP-ML- B10

Notes

Germany

## Desktop Services Market



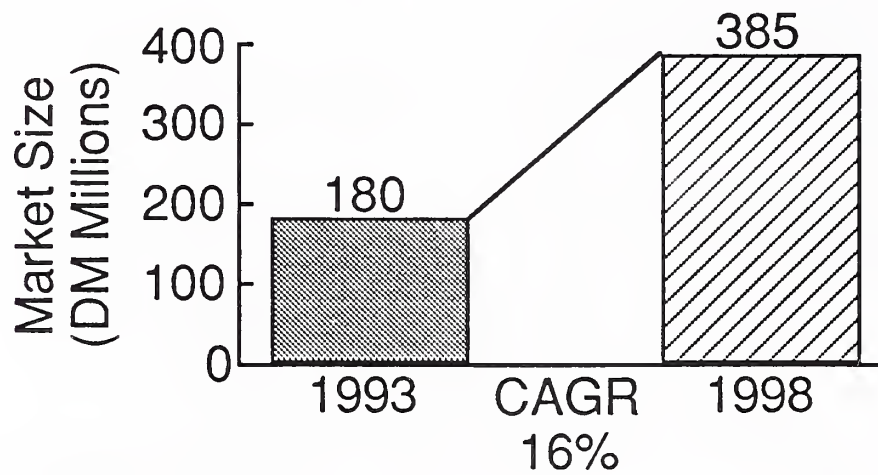
CSP-ML- B11

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Notes

Germany

## Desktop (Including Maintenance)

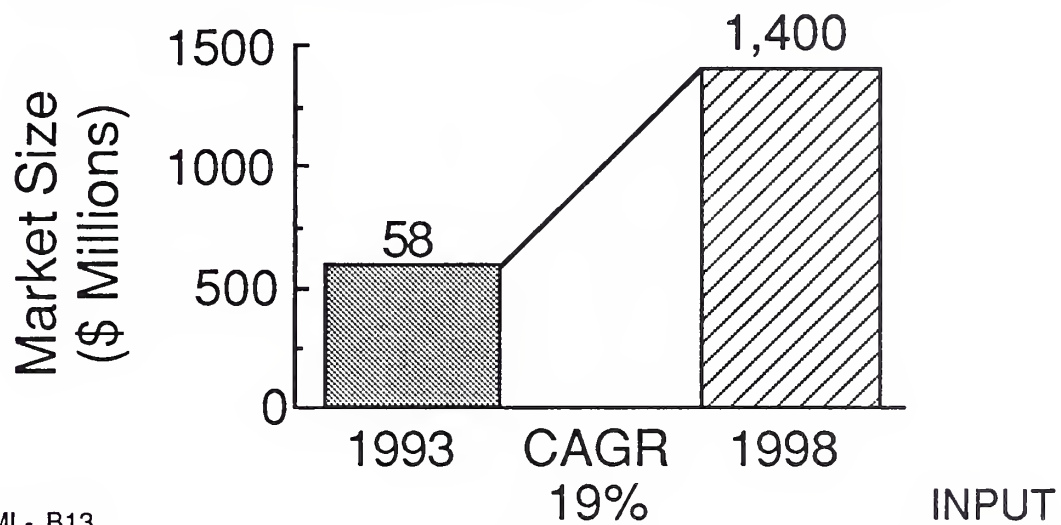


CSP-ML- B12

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Notes

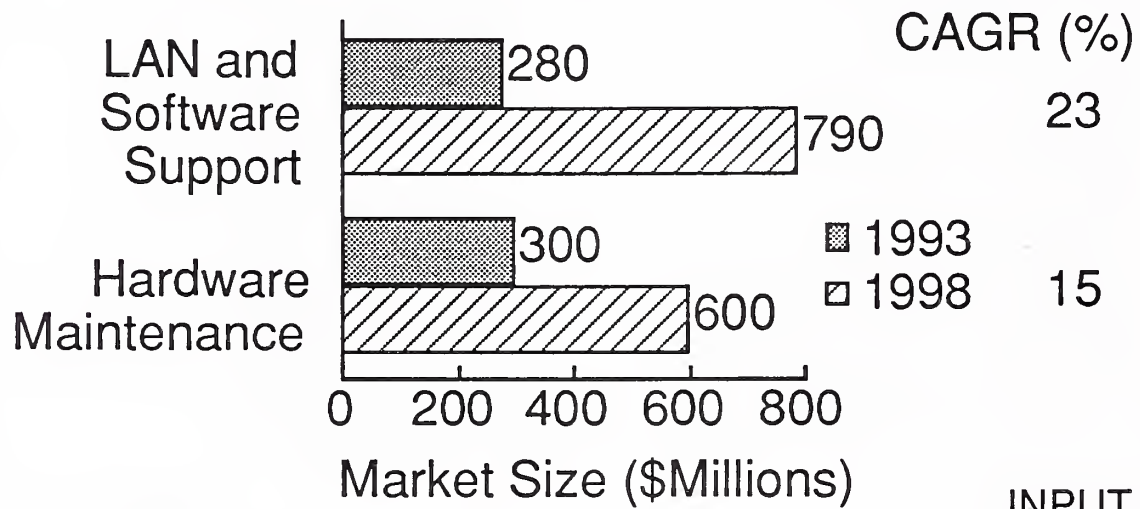
## Desktop Services–Europe (Including Maintenance)



CSP-ML- B13

Notes

# Desktop Services Market Europe, 1993-1998



CSP-ML- B14

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Notes



# Recommendations

- Innovate for differentiation
- Prioritise service elements
- Tools for partnership

CSP-ML- B15

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Notes



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- **Software and Services Market Forecasts**
- **Software and Services Vendors**
- **U.S. Federal Government**
  - Procurement Plans (PAR)
  - Forecasts
  - Awards (FAIT)
- **Commercial Application LEADS**

## CUSTOM PROJECTS

For Vendors—analyse:

- **Market strategies**
- **Product/service opportunities**
- **Customer satisfaction levels**
- **Competitive position**
- **Acquisition targets**

For Buyers—evaluate:

- **Specific vendors**
- **Outsourcing options**
- **Market opportunities**
- **Systems plans**
- **Peer position**

## OTHER SERVICES

Presentations to user groups, planning meetings, etc.

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