

CONFERENCE AGENDA

- 10:45 **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.
- 11:45 **UNIX Software Markets.** Dennis Wayson, INPUT VP, 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.
- 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, discusses leading vendors and their strategies, the likely incorporation of AI into mainstream applications, and predicts future directions in AI evolution.
- Turnkey Systems Markets, 1989-1994—**Mary Raymond discusses turnkey systems markets, which continue to be impacted by declining equipment prices, manufacturers' reduced discounts, and direct competition from the manufacturers and software suppliers. Successful strategies, new distribution channels, market shares, and market forces are covered.
- 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*



CONFERENCE AGENDA

Wednesday, October 25, Day 3

- 7:30 *Continental Breakfast*
- 8:30 **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.
- 9:30 **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.
- 10:30 **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.
- 11:30 **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*



INPUT's Eleventh Annual Executive Conference
Globalization of Information Services Markets

Monday, October 23, Day 1

CONFERENCE AGENDA

- 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 recommends 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 **European Information Services Markets.** Keith Hocking, INPUT Europe VP, 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.



CONFERENCE AGENDA

2:30-4:00

CONCURRENT ROUNDTABLE SESSIONS

Processing/Network Services Markets, 1989-1994—Bruce Hadburg, INPUT Senior Consultant, presents an analysis of these diverse markets. Processing services, the most mature delivery mode, continues to grow; network services and data bases are newer, more dynamic markets. Trends, issues, driving forces, leading vendors, and market shares are reviewed.

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—Victor Wheatman, INPUT Program Manager for EDI and nationally known 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. Bob Goodwin 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

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.

