

Introduction,  
INPUT Research Methodology

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Robert Goodwin  
Director, Vendor Research  
INPUT



## Conference Objectives

- Provide 1988-1993 Information Services Industry Forecasts
  - Revenues by Delivery Mode
  - Growth Rates by Delivery Mode
  - Trends/Issues
  - Driving/Inhibiting Forces
  - Technology Impacts
  - Vendor Activities/Market Share
  - Recommendations

INPUT

NOTES:

JJ88-RG1-2a



## Conference Objectives

- Present Research Findings 1988
- Focus on Special Interest Areas:
  - EDI
  - Federal Government
  - European Information Services
  - Customer Support Services
  - Systems Integration
  - Information Systems Trends
  - Telecommunications

INPUT

NOTES:

JJ88-RG1-2b



## Conference Objectives

- Forum for 3 Leading IS Vendors
- Opportunity for Informal Peer Discussions
- Recreation

INPUT

NOTES:

JJ88-RG1-2 C





# Wednesday A.M.

Introduction

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Trends for the 1990s

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Market Position—Computer Intelligence

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Software Products

---

IS Management—2000

INPUT

NOTES:

JJ88-RG1-3 A



# Wednesday P.M.

## Digital Equipment

Customer Service	Federal Markets	EDI
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Free Time

Cocktail Reception

Dinner Extravaganza

INPUT

NOTES:

JJ88-RG1-3 B



Thursday A.M.

Processing/Network Services Forecast

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User Research Finding

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Systems Integration Forecasts

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Arthur Andersen

INPUT

NOTES:

JJ88-RG1-4a



# Thursday P.M.

## Telecommunications

European Markets	Systems Integration	User Research
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Free Time

Cocktail Reception

INPUT

NOTES:

JJ88-RG1-4 B





# Friday

Turnkey Systems Forecast

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Professional Services Forecast

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IBM Application Systems Division

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CASE Outlook

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Wrap-Up, 1989 Programs

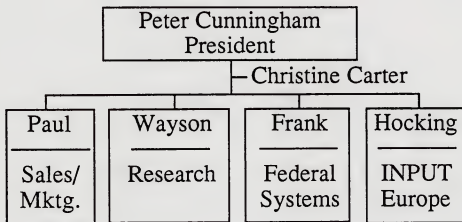
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NOTES:

JJ88-RG1-5



# INPUT Organization



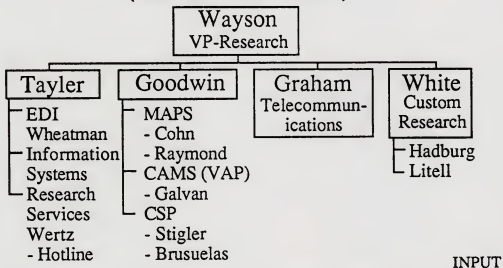
INPUT

NOTES:

JJ88-RG1-6



# INPUT Research Organization (Mountain View)



NOTES:

JJ88-RG1-7



INPUT Research  
Washington D.C.

John Frank  
Vice President

Jim Kerrigan  
Federal  
Government

Joanne Ponnwitz  
New Jersey

INPUT

NOTES:

JJ88-RG1-8





# INPUT Research Europe

Keith Hocking  
Vice President

Peter Lines  
Director, Research

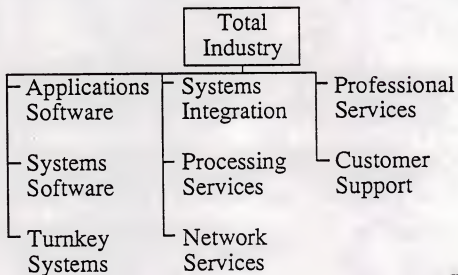
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NOTES:

JJ88-RG1-9



## Information Services Industry Structure



INPUT

NOTES:

JJ88-RG1-10

1870

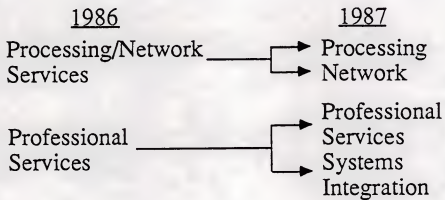
1871

1872

1873

1874

## Delivery Mode Expansion



INPUT

NOTES:

JJ88-RG1-11 A



## Delivery Mode Expansion

<u>1986</u>		<u>1987</u>
Applications Software	→	Unchanged
Systems Software	→	Unchanged
Turnkey Systems	→	Unchanged

INPUT

NOTES:

JJ88-RG1-11 B

Handwritten text, likely bleed-through from the reverse side of the page. The text is extremely faint and illegible due to the quality of the scan. It appears to be organized into several paragraphs or sections, possibly containing a list or table of contents.



## Vertical/Cross-Industry Markets

- "Office Systems" Category Added
- 6 Delivery Modes Forecast for  
Each Vertical/Cross-Industry Market
- Subcategories for Selected Verticals
  - Banking
    - Commercial Banks
    - Savings/Thriffs
    - Brokerage
    - Other
  - Manufacturing
    - CAD/CAE
    - Manufacturing  
Control

INPUT

NOTES:

JJ88-RG1-12a, b



## Vertical/Cross-Industry Markets

### Medical

- Hospitals
- Physicians/Clinics
- Other

### Federal

- DoD
- Civilian

### Insurance

- Life/Health
- Property/Casualty
- Agency

### State & Local Government

- State
- Local

INPUT

NOTES:

JJ88-RG1-12 C,D



## Research Methodology

900 Vendor  
Surveys

- 250 Largest
- Revenues: 86, 87, 88
- Growth
- Industries
- Delivery Modes
- Delivery Mode
- Industry Sector

Analysis

INPUT

NOTES:

JJ88-RG1-13a



## Research Methodology

Adjustments

- Large Companies
- Small Companies

Integrate

- Delivery Mode
- Industry

Convert

- Vendor \$ to  
User Exp.

INPUT

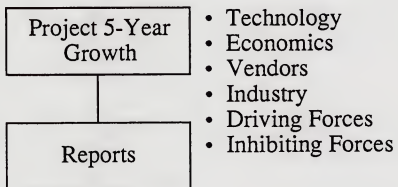
NOTES:

JJ88-RG1-13b





## Research Methodology



INPUT

NOTES:

JJ88-RG1-13c



All INPUT Forecasts Are for U.S.  
Non-Captive User Expenditures,  
in Current Period Dollars.

INPUT

NOTES:

JJ88-RG1-14



## Inflation Assumptions

	'88	'89	'90	'91	'92	'93
Consumer Price Index,* Percent Change Year-to-Year	4.3	4.1	3.6	3.2	2.7	2.2

\* For urban wage earners, and clerical workers

Source: President's Council of Economic Advisors, February 1988

INPUT

NOTES:

JJ88-RG1-15



## Economic Growth Assumptions

	'88	'89	'90	'91	'92	'93
Real GNP Percent Change, Year-to-Year	2.9	3.1	3.5	3.4	3.3	3.2

Source: President's Council of Economic Advisors, February 1988

INPUT

NOTES:

JJ88-RG1-16

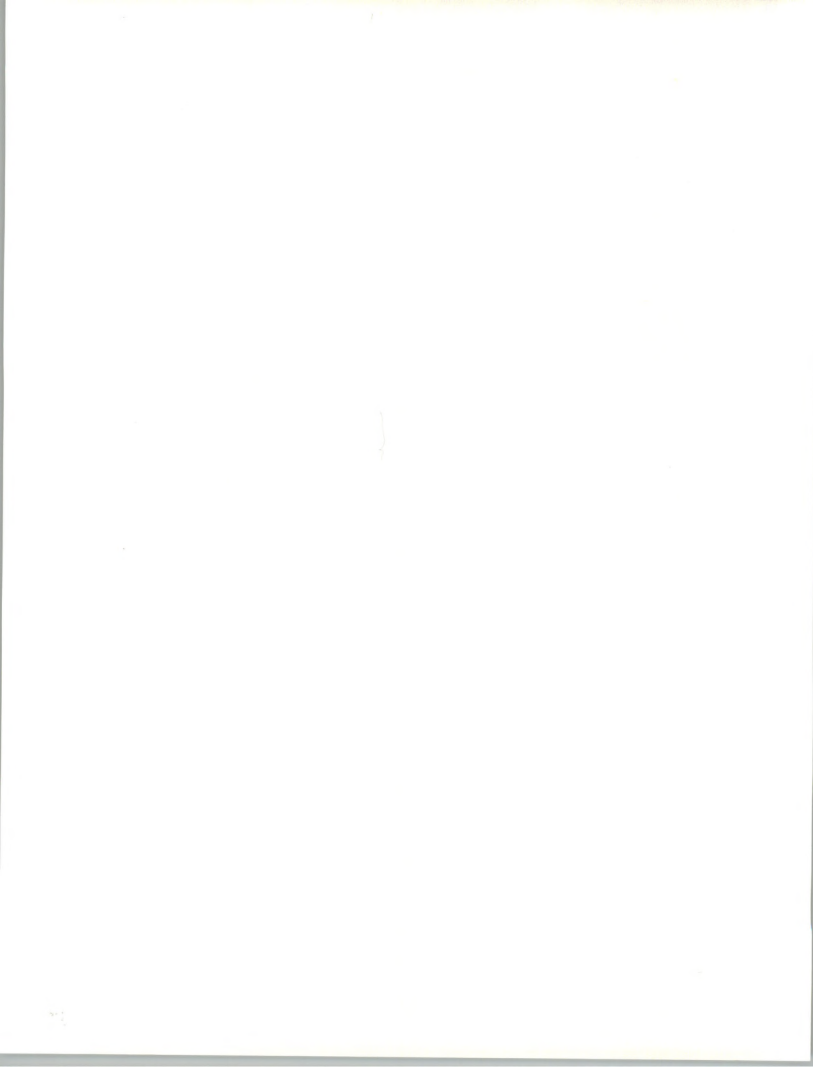




Robert L. Goodwin  
Director, Vendor Research  
INPUT

Robert L. Goodwin directs INPUT's vendor-related research and is responsible for development and quality of all INPUT forecasting activities. He has more than 25 years of successful sales, marketing, and general management experience in the computer equipment, remote processing services, and software industries. Mr. Goodwin's expertise spans many areas of information services, including business plan development, strategic partnering, acquisitions, VAR, and reseller operations. He held senior management positions at both large and midsize corporations, including positions as President of Command Data Systems, Director of Marketing with Xerox Computer Services, and Branch Manager for IBM.

Mr. Goodwin holds a B.S. degree from Occidental College and has attended the MBA program at Golden Gate University.



①

INPUT  
~~CLIENT~~  
INFORMATION  
SERVICES  
FORUM

~~SCOTTSDALE, ARIZONA~~  
~~SEPT 28-30, 1988~~

yellow  
outline  
yellow  
text

Tenth Annual  
Executive  
Conference

INFORMATION — white  
SYSTEMS &  
SERVICES  
INDUSTRY  
FORUM  
1988-1993

INPUT — yellow

special



Introduction  
and

Input

Research →

Methodology

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Robert Zoderwin  
Director, User Research

INPUT

①

# Company Analysis and Monitoring Service (CAMS) 1988 Directory

- New Entry  
 Revised

*Provide as much data as known. Partially complete forms are welcome.*

Vendor Name: \_\_\_\_\_

Address: \_\_\_\_\_

Phone Number: \_\_\_\_\_

CEO/President: \_\_\_\_\_

Key Contact: \_\_\_\_\_

(Name)

(Title)

Total Employees: \_\_\_\_\_

Company's Primary Business: \_\_\_\_\_

Annual Revenue \$ \_\_\_\_\_

Fiscal Year Ending \_\_\_\_/\_\_\_\_/\_\_\_\_

—or— Revenue Range:

Mo Day Yr

Under \$1 Million

\$10-20 Million

\$1-5 Million

Over \$20 Million

\$5-10 Million

What percent of your revenue is derived from:

U.S. \_\_\_\_\_% International \_\_\_\_\_%

What percent of your revenue is derived from information services?

\_\_\_\_\_%

What percent of information services revenue is derived from the following delivery modes:

Application Software Products	_____%
Systems Software Products	_____%
Processing Services	_____%
Network Services	_____%
Turnkey Systems	_____%
Professional Services	_____%
Systems Integration	_____%
Total	100%

Target Industries: \_\_\_\_\_

Type of Ownership:

Public

Subsidiary

Private

Division

Parent Corporation: \_\_\_\_\_

Subsidiaries: \_\_\_\_\_

Submitted by: \_\_\_\_\_

*Please put INPUT on your mailing list and send product literature.  
Thank You.*

**INPUT** 1280 Villa Street, Mountain View, CA 94041 (415) 961-3300

Coffee

OBJECTIVES

- Provide 1988-1993 information
  - source industry forecasts
  - revenues by delivery mode
  - growth rates " "
  - trends / driving forces / issues
  - vendor activities / market share
  - technology inputs

• Present ~~strategic~~ <sup>recommendation</sup> ~~research~~ <sup>1985</sup> ~~fishings~~

• focus on specific function / market areas: ~~Information Integration~~

- application systems
- systems
- business systems
- personal services
- processing services
- retail services

- EDI
- Federal Government IS
- European IS
- Federal organizations
- Customer Support
- User Information Systems

- Forum for <sup>3</sup> leading IS vendors
- opportunity for informal peer discussions
- Recreation

• Focus on special  
interest areas:

- EOI
- Federal Government
- Europe IS
- Customer Support/Service
- Telecommunications
- IS user trade
- Information Systems Trade



WEDNESDAY		
Introduction		
Keynote: Trends for the 1990s		
Market Position		
Software Products		
IS Management		
Lunch		
Customer Service	Federal Markets	EDI
Free Time		
Cocktail Reception		
Dinner Extravaganza		

make 2 col.  
or 2 slides AM/PM.

DIGITAL EQUIPMENT

ROTATE 90°



Thursday

THURSDAY		
<del>Continental Breakfast</del>		
Processing/Network Services Forecasts		
User Research Findings		
SI Forecasts		
Guest Speaker (BA)		
Lunch		
Telecommunications		
European Markets	Systems Integration	User Research
Free Time		
Cocktail Reception		

— Arthur Anderson

← rotate 90°



FRIDAY

4

Turnkey Systems Forecast

Professional Services  
Forecast

IBM Application Systems  
Division

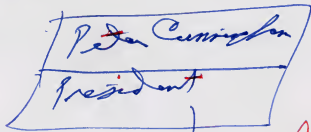
CASE Outlook

Wrap-Up  
1989 Programs

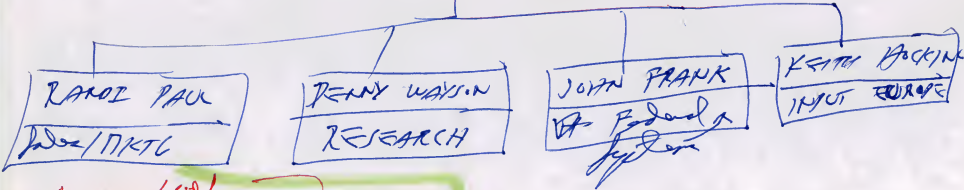


INPUT

ORGANIZATION



— Chief Clerk



- Nancy Hill
- George Hunter
- John Marshall
- James George Robinson
- Jason Fzian
- Dominic Jones

Optional

OPTIONAL





11/8/94 Research Organization (Mountain View)

Denny Woyton  
VP - Research

Doug Taylor

B. L. Hoodin

Andy Hoban  
Telecommunications

Denny White  
Customer Research

- Vic Whitman
- EOI
- ~~user information~~  
system program
- ~~research~~
- ~~As~~
- Kim Wertz  
unresearch  
service  
- follow

- NAPS
- Mike Cole
- Tony Raymond
- CAMS (VAP)
- Terry Johnson
- Customer support
- Buddy Hughes
- Rich Brumback

~~Dee~~

- Case
- Dave Hodding
- Panel
- Norman  
filled

(Ordea - if no room, you can delete names of people not in boxes, leave program name.)



INPUT - Working  
Reseal - Washington DC

John Frank  
Vice President

Jim Keegan  
Federal Government

Joanne Pomnitz  
New Jersey



Lyant Research - UK  
Europe

Keith Holbing  
~~James Harper UK~~  
Director VP

Peter Jones,  
Director, Research  
Director



# Information Service Industry Students

Total  
Industry

application  
software

systems  
software

Turnkey  
systems

customer  
support

processing  
services

network  
services

professional  
& services

systems  
integration

as many  
col. as  
~~poss~~. nec.





# Delivery Mode Expansion

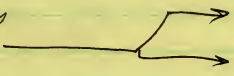
New  
after  
7  
10

M.B

1986

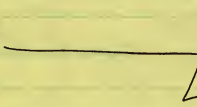
1987

Processing / Network  
services



Processing  
Network

Professional  
services



Professional  
services  
System  
Integration

Application  
software



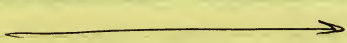
unbundled

System  
software



"

Turnkey  
systems



"



(New)

Vertical / cross-industry markets

10

- "office systems" category added
- 7 delivery notes present for each vertical / market, cross-industry market

SPLAT

Sub-categories for selected verticals

- Building
- Commercial
  - residential
  - schools
  - hospitals
  - other

- Manufacturing
- CBQ/CAE
  - production control

- Medical
- Hospitals
  - Physicians / Clinics
  - Other

- Insurance
- Medical / Life / Health
  - Property / Casualty
  - Agency

SPLAT

- Federal
- DoD
  - Coast Guard

- State & Local government
- State
  - Local

10

1917

Dear Mother

I received your letter of the 10th and was glad to hear from you.

I am well and hope these few lines will find you the same.

I have not much news to write at present.

I am still in the hospital and am getting on better every day. I hope to be home soon.

I have not much news to write at present.

I am still in the hospital and am getting on better every day. I hope to be home soon.

# Research Methodology

900 VENDOR SURVEYS

- 25% LARGEST
- REVENUES
- GROWTH
- INDUSTRY
- DELIVERY MODE

ANALYSIS

- DELIVERY MODE
- INDUSTRY SECTOR

B<sub>0</sub>

ADJUSTMENTS FOR:

- LARGE COMPANIES
- SMALL COMPANIES

INTEGRATE

- DELIVERY MODE
- INDUSTRY

B<sub>1</sub>

CONVERT

VEHICLE TO USER EXP.

PROJECT 5-YR GROWTH

- TECHNOLOGY
- ECONOMY
- VENDORS
- INDUSTRY
- DRIVING FORCES
- INHIBITORS

B<sub>2</sub>

5-YR REPORT

Order - d  
want to insert  
this into the  
III introduction  
section - could be  
overlaid.

Bob  
used o.p.  
13, 13a.

non-  
reflex

All report presents one for U.S. &  
user expenditures, in current period dollars.





INFLATIONASSUMPTIONS

	88	89	90	91	92	93
CONSUMER						
PRICE INDEX*	4.3	4.1	3.5	3.2	2.7	2.2
% CHANGE PER YEAR						

\* for urban wage earners and clerical workers

Source: President's Council of Economic Advisors,  
Feb. 1989



# ECONOMIC GROWTH ASSUMPTIONS

	<u>88</u>	<u>89</u>	<u>90</u>	<u>91</u>	<u>92</u>	<u>93</u>
REAL GDP	2.9	3.1	3.5	3.4	3.3	3.2
% CHANGE, <del>CURRENT</del> <del>YEAR</del> → YEAR-TO-YEAR						

SOURCE: Presidential Council of Economic Advisors,  
Feb. 1989



Input Research ~~Philosophy~~  
Procedures

- Princy <sup>research</sup> Katarian (Delaware)
  - Co-IO in 1987
  - Users
  - vendors
- Secondary <sup>research</sup> sources in INPUT information center
- Analysis by senior managers and consultants
  - 20 years + experience in information services & systems markets
- Written reports, and newsletters and bulletins

