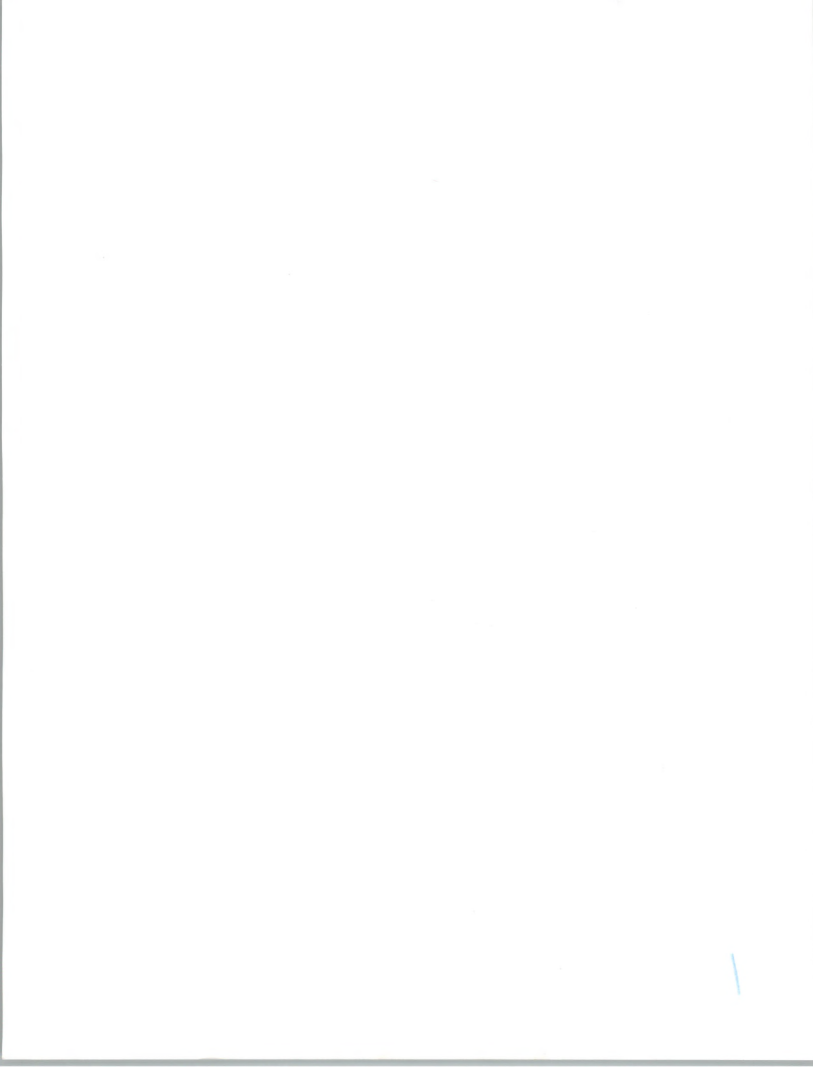


**Systems Integration and  
Outsourcing Opportunities  
in the Client/Server  
Environment**

---

**J.P. Richard**  
Vice President  
Manager  
Outsourcing Program

**Brian Wessner**  
Manager  
Systems Integration Program







# Systems Integration Opportunities in the Client/Server Environment

MC3-BW- 1

INPUT

Notes



# Brian Wessner

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## Program Manager Systems Integration

MC3-BW- 2

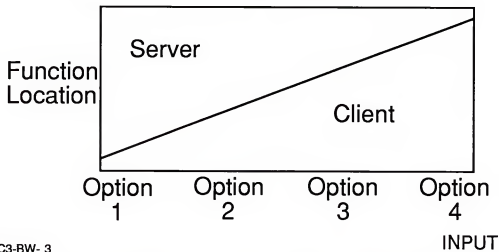
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Notes





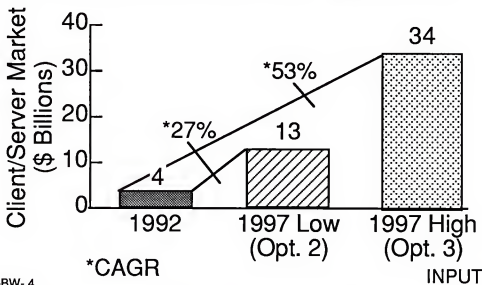
# Client/Server Boundaries Where is the Balance?



Notes



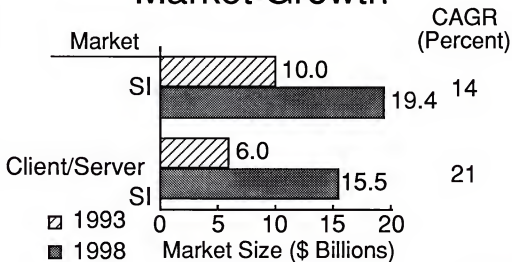
# The Client/Server Market



Notes

6

# Market Growth



MC3-BW- 5

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Notes

1

## Client/Server Affects Systems Integrators

- Increased complexity
- Multiple architectures
- Users acquiring services
- Smaller SI projects

MC3-BW- 6

INPUT

Notes

8



## Client/Server Demands New Skills

- LANs, MANs, WANs
- Open systems
- System design and management
- Workflow
- Business process

MC3-BW- 7

INPUT

Notes



Client/Server Not Always the Answer  
**Say "Yes" to Client/Server**

- Local control of data, applications
- Matches business function
- Speed applications development
- Scalability
- Cost reduction

MC3-BW- 8

INPUT

Notes



Client/Server Not Always the Answer

## Say "No" to Client/Server

- Data remaining centralized
- Unable to support completed system
- Users unwilling to manage system
- Security
- Cost increase

MC3-BW- 9

INPUT

Notes

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Client/Server Opportunities

## Increasing Value to Client

- Coupling to business process and workflow projects
- Helping client determine benefits and high-value applications
- Expanding legacy systems portfolio

MC3-BW- 10

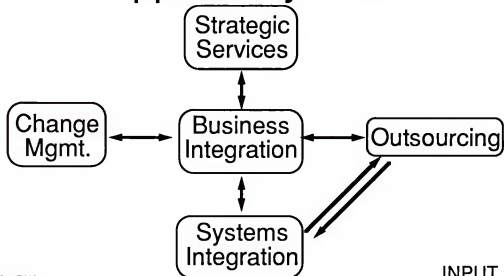
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Notes

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Client/Server Opportunities  
**Opportunity Flow**



Notes

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## Client/Server Opportunities

# Key Indicators

- 30% of companies have a client/server migration strategy
- 40% say next system will be client/server
- Approximately 70% will use client/server for any new applications

MC3-BW- 12

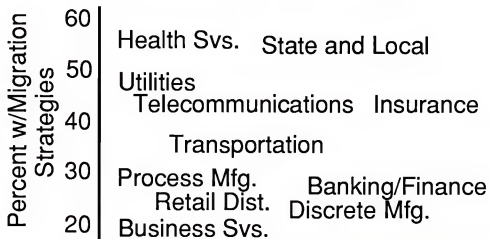
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Notes



## Client/Server Opportunities

# Who Has A Strategy?



MC3-BW- 13

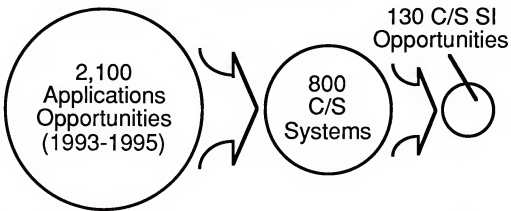
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Notes



Client/Server Opportunities

## The Challenge: Market Awareness



MC3-BW- 14

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Notes





# Outsourcing Opportunities in the Client/Server Environment

MC3-JP- 1

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Notes

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# J.P. Richard

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Vice President  
Manager  
Outsourcing Program

MC3-JP- 1a

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Notes



Client/Server Shift  
Impacts Outsourcing Market

- Positive
  - Transition outsourcing opportunities
  - New opportunities in:
    - Desktop services
    - Network management

MC3-JP- 2

INPUT

Notes



Client/Server Shift

## Impacts Outsourcing Market

- Negative
  - New contracts
    - Shorter duration
    - Lower value
  - Existing contracts
    - Renegotiations
    - Changing requirements

MC3-JP- 3

INPUT

Notes

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## Outsourcing Market Growth Pattern Changing

Type of Outsourcing	\$ Billions		CAGR (Percent)
	1993	1998	
Platform Ops.	3.9	6.7	12
Application Ops.	5.4	11.2	15
Application Mgmt.	0.6	1.7	27
Desktop Svcs.	1.4	3.6	21
Network Mgmt.	1.3	4.1	26

MC3-JP- 4

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Notes

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## Proportion of Outsourcing Market Related to C/S Shift

Type of Outsourcing	1993 (Percent)	1998 (Percent)
Platform Ops.	20	20
Application Ops.	20	80
Application Mgmt.	10	70
Desktop Svcs.	100	100
Network Mgmt.	50	90

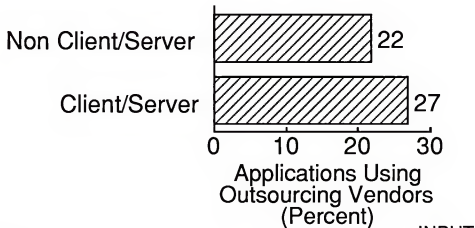
MC3-JP- 5

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Notes

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## Use of Outsourcing Vendors C/S Vs. Non C/S Applications



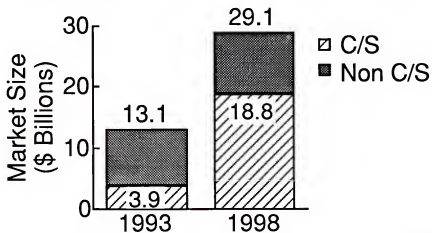
MC3-JP- 6

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Notes



## New Opportunities Created by C/S in Outsourcing



MC3-JP- 7

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Notes

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# Vendor Responses to Client/Server Challenge

- ISSC
  - Expand SI responsibilities/capabilities
  - Develop business/consulting skills
- EDS
  - Expand TPD to Europe market
  - Refine methodology and logistics expertise

MC3-JP- 8

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Notes

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## Vendor Responses to Client/Server Challenge

- CSC
  - Team with CSC Index and CSC Partners
  - Leverage existing system integration capability
- Digital
  - Leverage network management strength
  - Capitalize on strong hardware client base

MC3-JP- 9

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Notes

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## Conclusions

- Market shift to accelerate
- Contracts will reflect changes
  - Short term
  - Share in savings
- Market leaders continue to innovate

MC3-JP- 10

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Notes

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***JEAN-PAUL RICHARD***  
***VICE PRESIDENT***

**PROFILE**

***CAPABILITIES***

- Mr. Richard has 23 years of experience in the data processing industry. He has served as a systems analyst and has held management positions in marketing, field and headquarters sales, as well as strategic planning.
- Mr. Richard directs the Outsourcing Information Systems Program and has administrative responsibility for INPUT's Vienna office.

***BACKGROUND***

- Prior to joining INPUT, Mr. Richard served as a program manager at Boeing Computer Services, emphasizing acquisition of federal government business. At General Electric Information Services, he held positions as manager of sales planning and sales administration. He also managed commercial sales and marketing offices in Canada and France for General Electric Information Services.
- Mr. Richard began his data processing career as a systems analyst. He moved to a client services environment dealing with a range of firms from insurance companies to chemical manufacturers.

***EDUCATION***

- B.S., Chemistry, Northeastern University, Boston, Massachusetts
- M.S., Industrial Management, Sloan School, MIT, Cambridge, Massachusetts

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**BRIAN P. WESSNER**  
**MANAGER**  
**SYSTEMS INTEGRATION PROGRAM**

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**PROFILE**

**CAPABILITIES**

- Mr. Wessner has 21 years of experience in the computer industry, including 16 years of financial and management responsibility in consulting, client services, and product management.
- With INPUT, Mr. Wessner provides information and consulting to executives and planning managers in the systems integration and professional services markets. He specializes in analysis and forecasting of major trends in these markets, particularly in software, services, and the impact of information technologies on the development and delivery of services.

**BACKGROUND**

- Previously, he was a market segment manager of Legent Corporation, a Vienna, Virginia developer of systems management software. Prior to that, Mr. Wessner was with Amdahl Corporation and KPMG Peat Marwick, responsible for management consulting projects with major Fortune 500 corporations. Projects included EDP planning, organizational analysis, and systems management.
- Mr. Wessner started his career with United Technologies in 1972 in software development for a manufacturing environment.

**EDUCATION**

- B.S. (Aerospace Engineering), Parks College of Aerospace Technology, St. Louis University, St. Louis, MO.
- M.S. (Computer and Information Science), University of New Haven, New Haven, CT.

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