Einat Shimoni
Enterprise applications

STKI Summit 2013

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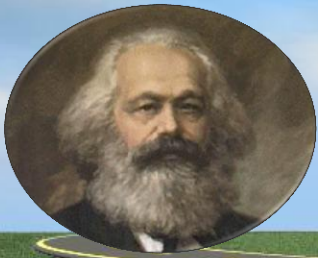IT at the crossroads:
Lead, follow or get out of the way

From:

To:

I ♥ ENTERPRISE

I ♥ ME

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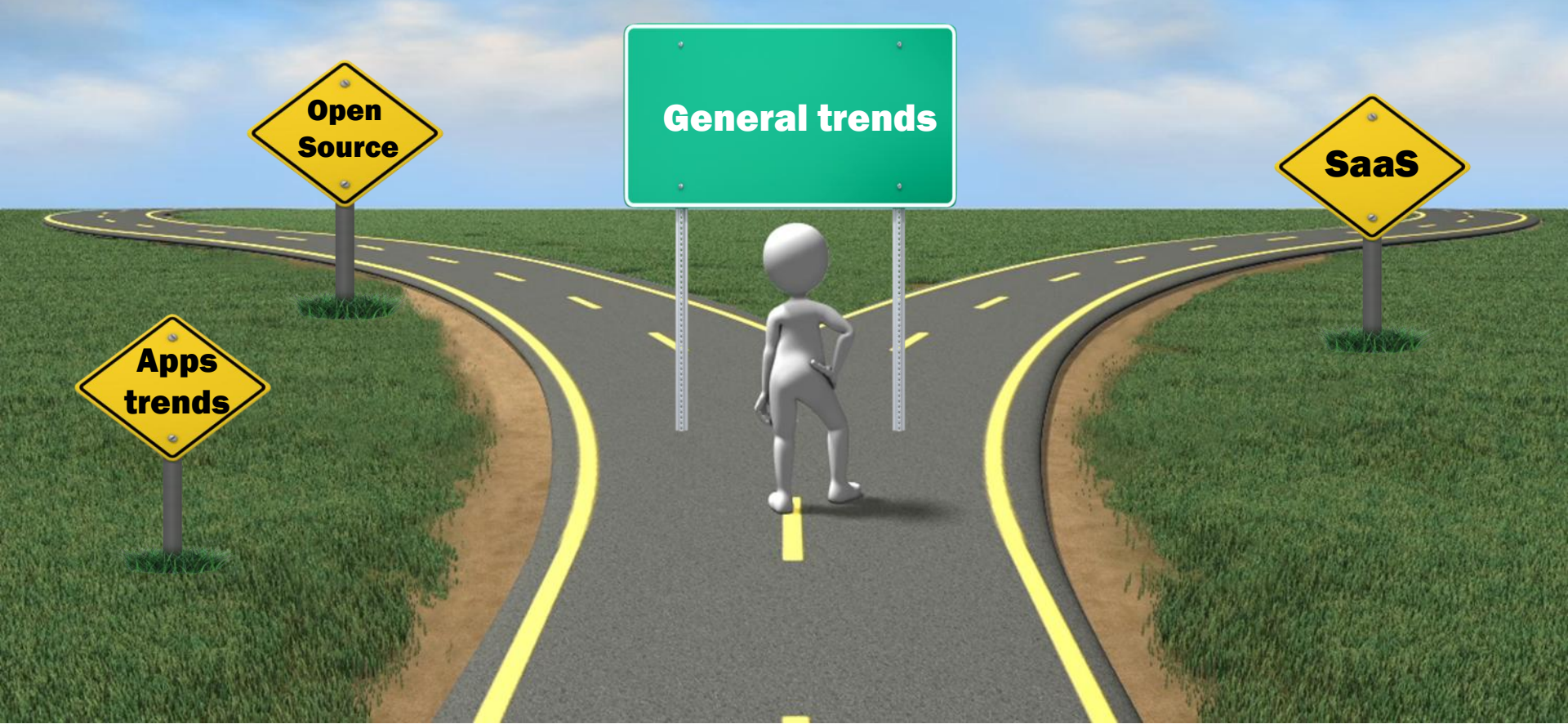
Karl Marx

Collectivism

man must be connected to a collective and collective thought for the sake of 'the common good'

Ayn Rand

Individualism

The pursuit of his own rational self-interest and of his own happiness is the highest moral purpose of his life.

IT is KING

Individual is KING

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CoIT   "consumerization" of IT services

Impact of Me Economy on IT

❖ BYOD

❖ BYOA

❖ BYOBI

❖ Gamification

❖ UX and ease-of-use

❖ The empowered knowledge worker

❖ The empowered customer

❖ Open source?

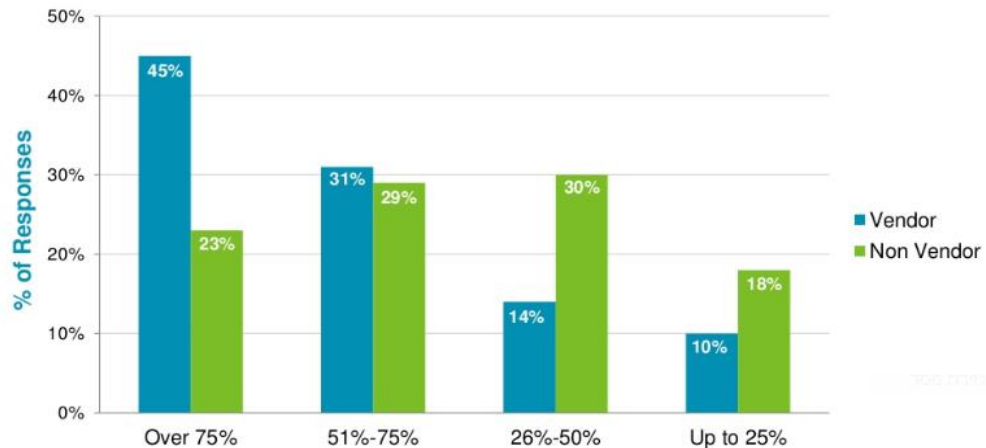Individual is KING

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VENDORS VS. NON-VENDOR COMPANIES
OSS DEPLOYMENT IN 5 YEARS

FUTURE OF OPEN SOURCE 2012

Enterprise adoption
of open source:

40%

Source: http://mjskok.com/resource/2012-future-open-source-6th-annual-survey-results

600,000 projects in 2012

100,000 projects in 2006

❖5 out of 6 developers already using OS as part of projects (Forrester)

❖Drivers in 2013:

    ❖Budget pressures/ high perpetual software maintenance

    ❖Functionality

        ❖ Innovation (new areas: mobile, big data; innovation in others – BI…)

   ❖ Consumerization

Open Source (worldwide) adoption is high

WHY DIDN'T YOU CHOOSE OPEN SOURCE?
34% Poor Documentation
27% Lack of Support

WHY DID YOU CHOOSE OPEN SOURCE?
73% Flexibility
71% Lower Costs

WHAT IS YOUR ORGANIZATION'S STANCE ON USING OPEN SOURCE SOFTWARE?
76.2% Use whenever possible
9.5% Only when commercial support is available
14.3% Use sparingly

❖Source: Zenoss survey

Accenture study finds that <u>quality</u> exceeds <u>cost</u> as the main driver for adoption
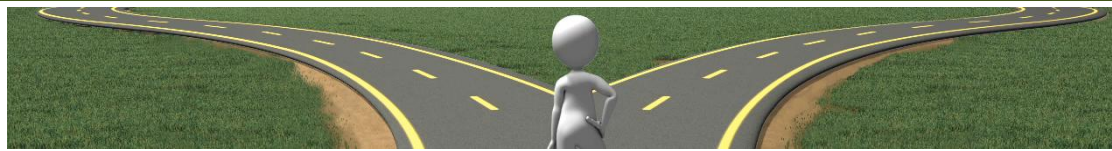
Open source in Israel: very low

❖Israel market is still missing out on open source!

❖STKI recommendations (user organizations):

    ❖Consider at least 1 OS option in every software purchase (we will include OS options in our categories)

    ❖Try it out in 1 low-risk area to get a taste

❖STKI recommendations (vendors): start supporting and suggesting OS in RFPs

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❖ STKI mentions OS options in almost every category in IT

❖ Lists of OS players:

　　❖ http://www.ohloh.net/

　　❖ http://www.osalt.com/

❖ New Israeli hub for open source solutions: **2BOpen**

❖ Community vs. commercial:

　　❖ Israeli market not ready for community (free) OS

　　❖ Vendors should offer Israeli-supported, commercial OS options

❖Enterprise-grade support (vs. community support, no SLA)

❖Input on roadmap and new features

❖Testing, bug fixes and security updates

❖Extra functionality

❖Avoiding GPL (modify the solution without obligation of providing resulting code to the community under GPLv2 license)

Source: CIO magazine

TOP BARRIERS TO OPEN SOURCE SELECTION

DAILY NEWS

Unfamiliarity with open source solutions

48%

DAILY NEWS

Lack of formal commercial vendor support

35%

DAILY NEWS

47%

Lack of internal technical skills

FUTURE OF OPEN SOURCE 2012

Source: http://mjskok.com/resource/2012-future-open-source-6th-annual-survey-results

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Most Israeli organizations plan to start using SaaS in 2013
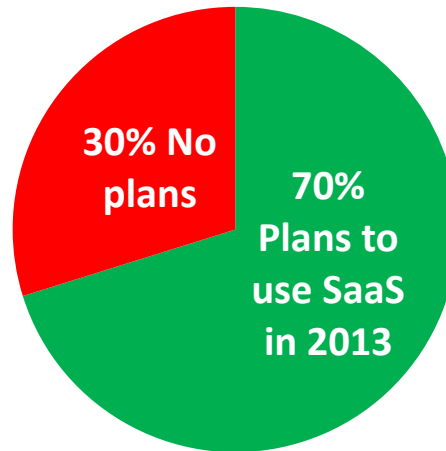
30% No plans

70% Plans to use SaaS in 2013

Source: STKI Survey 2013

Number of Cloud Providers Used

Regardless of the number of different platforms and options, how many actual cloud providers do you use (e.g., Salesforce, Google, Oracle, GoGrid)?
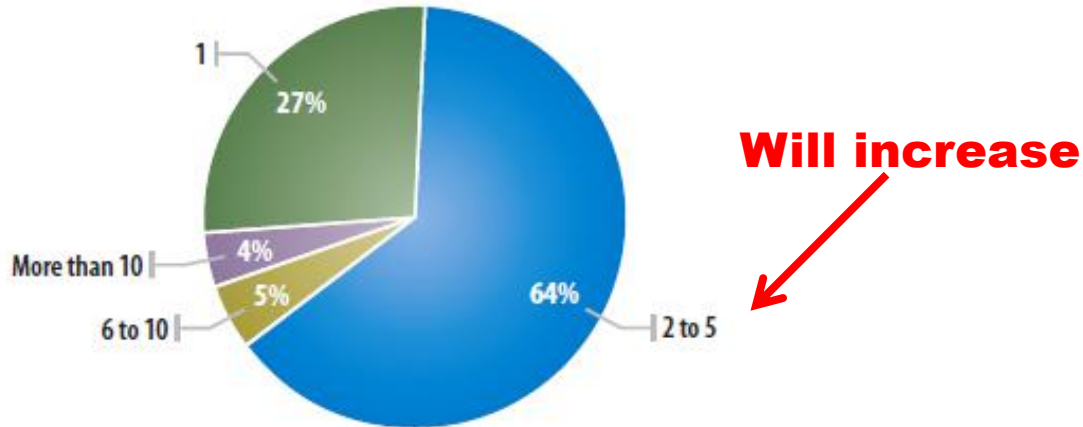
1 — 27%

More than 10 — 4%

6 to 10 — 5%

64% — 2 to 5

Will increase

Base: 166 respondents using cloud computing services

Data: *InformationWeek* 2012 State of Cloud Computing Survey of 511 business technology professionals at organizations with 50 or more employees, December 2011

R4020112/4

❖ Still "on the edges" (50% using cloud for 1-25% of IT services)

  ❖ ~60% of them using SaaS
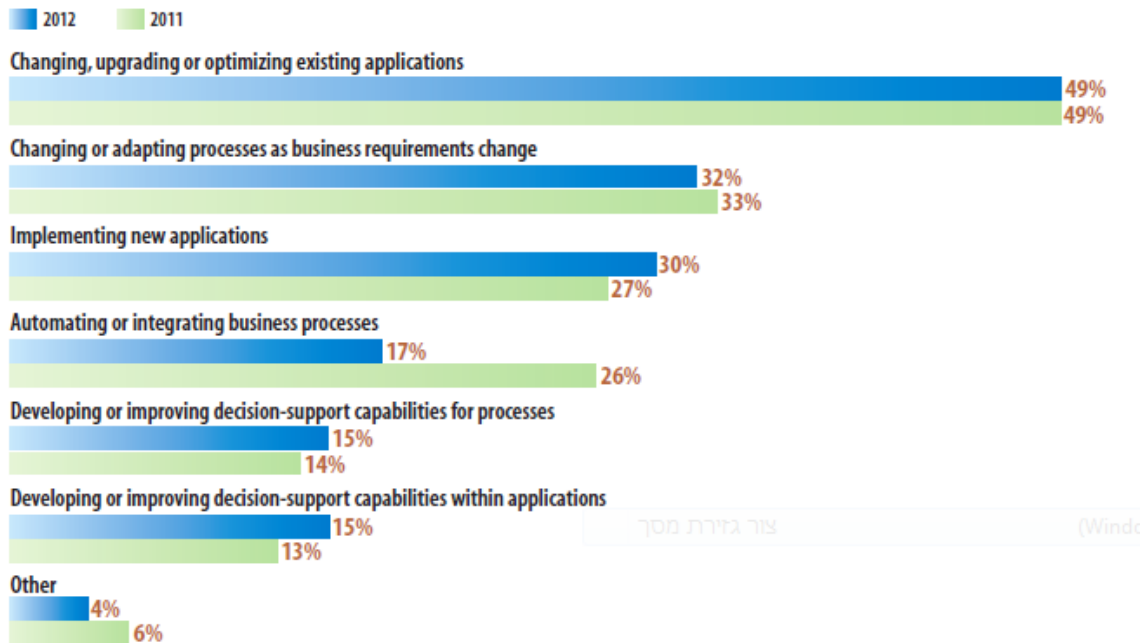
  ❖ ~40% planning to use PaaS

❖ Major advantage:

keeping up with market trends

Barriers to Success

What are your organization's biggest application- or process-management-related impediments to success?

■ 2012   ■ 2011

Changing, upgrading or optimizing existing applications
49%
49%

Changing or adapting processes as business requirements change
32%
33%

Implementing new applications
30%
27%

Automating or integrating business processes
17%
26%

Developing or improving decision-support capabilities for processes
15%
14%

Developing or improving decision-support capabilities within applications
15%
13%

Other
4%
6%

Note: Two responses allowed
Base: 338 respondents in April 2012 and 314 in May 2011
Data: *InformationWeek* Enterprise Applications Survey of business technology professionals

R5010812/2

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❖Integration is the top concern for cloud (followed by security)

❖Coding! (47%)

❖Only 9% using Integration-as-a-service /other tools

❖20% of attempted SaaS deployments are failing due to data integration problems (Source: Readwrite enteprise)

Integrating Cloud Applications

How do you integrate your different cloud and SaaS applications?

Custom coding directly to our internal system using each vendor's API
47%

Leverage an internal integration platform
14%

Leverage a traditional VAN for data integration
10%

Leverage a cloud-based integration platform
9%

Other
11%

Don't know
27%

Note: Multiple responses allowed

R4020112/3

Base: 166 respondents using cloud computing services

Data: *InformationWeek* 2012 State of Cloud Computing Survey of 511 business technology professionals at organizations with 50 or more employees, December 2011

❖SaaS disadvantage (but also advantage): <u>lack of customization</u>

❖Will drive interest in PaaS (to create "XRM" cloud applications)

❖PaaS will be the next area to grow

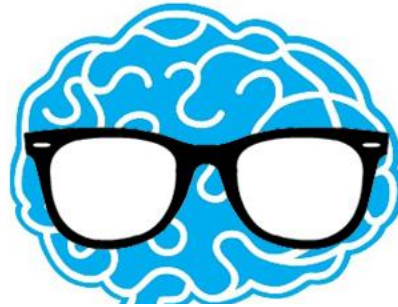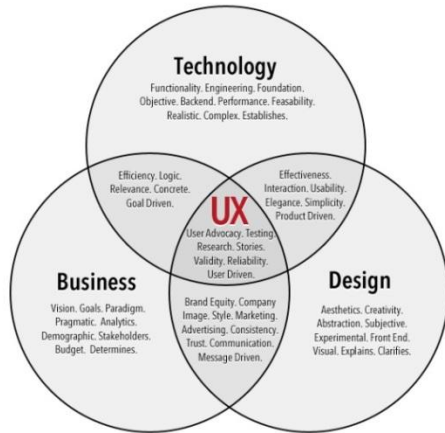# Application (new) development options:

Traditional development

Wanted: easier-to-use applications

Use of UI experts

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❖ "Big data inside" – applications will be re-written on DBMS appliances to offer a real time experience

❖ Everything mobilized – usually HTML5 + some native apps

❖ Hybrid cloud model – ability to combine on and off premise

❖ Everything will be "app-store-ised"

❖ Better UI (finally!)

Packaged applications

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Gamification

❖ A system that is designed to optimize the motivations and feelings of humans

❖ Human-focused design (as opposed to Function focused design)

❖ Not just about PBLs (Points, badges, leaderboards)

❖ Good gamification starts with our core drives

   ❖ Source: Yu-kai Chou, gamification designer, http://www.enterprise-gamification.com/

❖ By 2015, 40% of G1000 organizations will use gamification as the primary mechanism to transform operations (Gartner)

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Gamification

❖Usage in organizations:

    ❖Customer engagement and loyalty

    ❖Learning and knowledge management

    ❖Employee performance and productivity

    ❖Gamification + crowdsourcing = Innovation and ideas

Tools in Israel
GamesEffectice
Developments by web companies
Open source tools

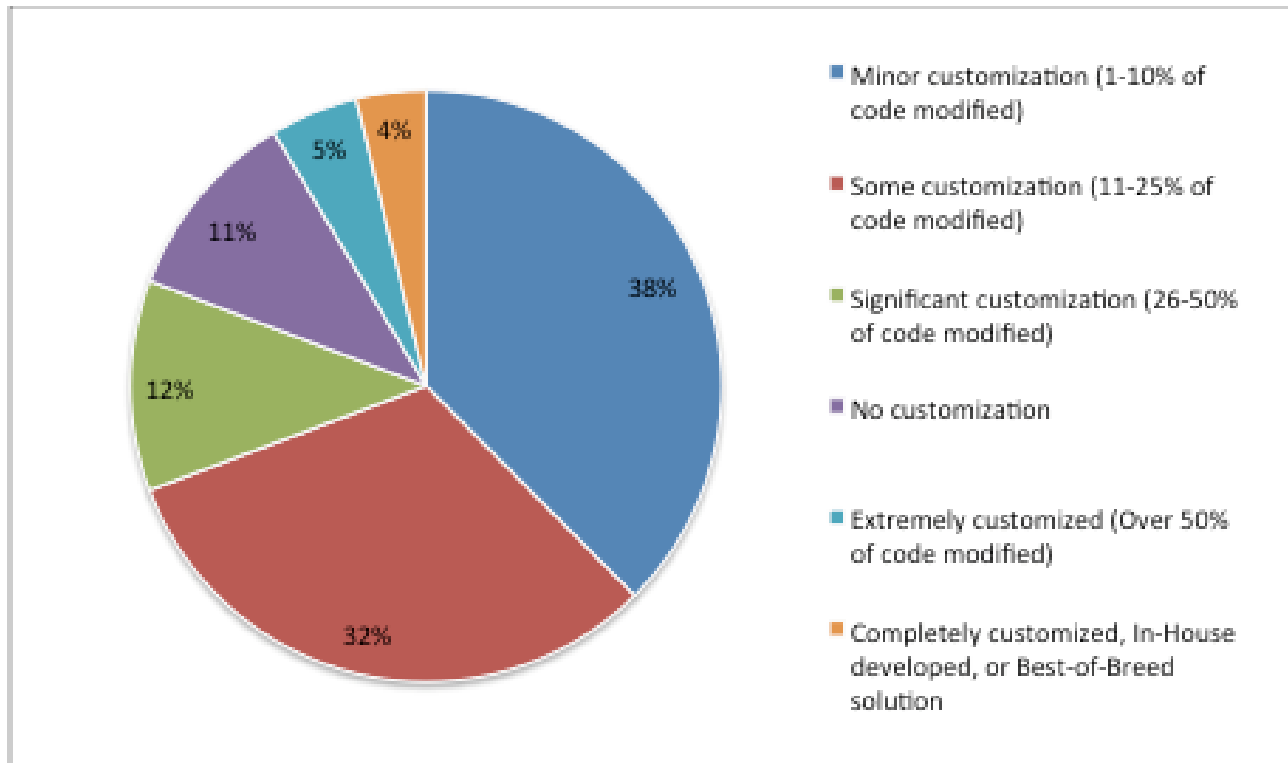stki.info
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ERP, EPM, HCM

ERP

❖ <u>#1 most adopted technology</u> in organizations but is still also the most invested area

❖ Implementation time is now shorter due to maturity of both vendors and users

❖ Ongoing maintenance + staffing still very high

By Frits Ablefeldt

Customizations – major problem, but improving

- Minor customization (1-10% of code modified)
- Some customization (11-25% of code modified)
- Significant customization (26-50% of code modified)
- No customization
- Extremely customized (Over 50% of code modified)
- Completely customized, In-House developed, or Best-of-Breed solution

38%
32%
12%
11%
5%
4%

Source: Panorama Consulting ERP 2012 report

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Oracle
Endeca:
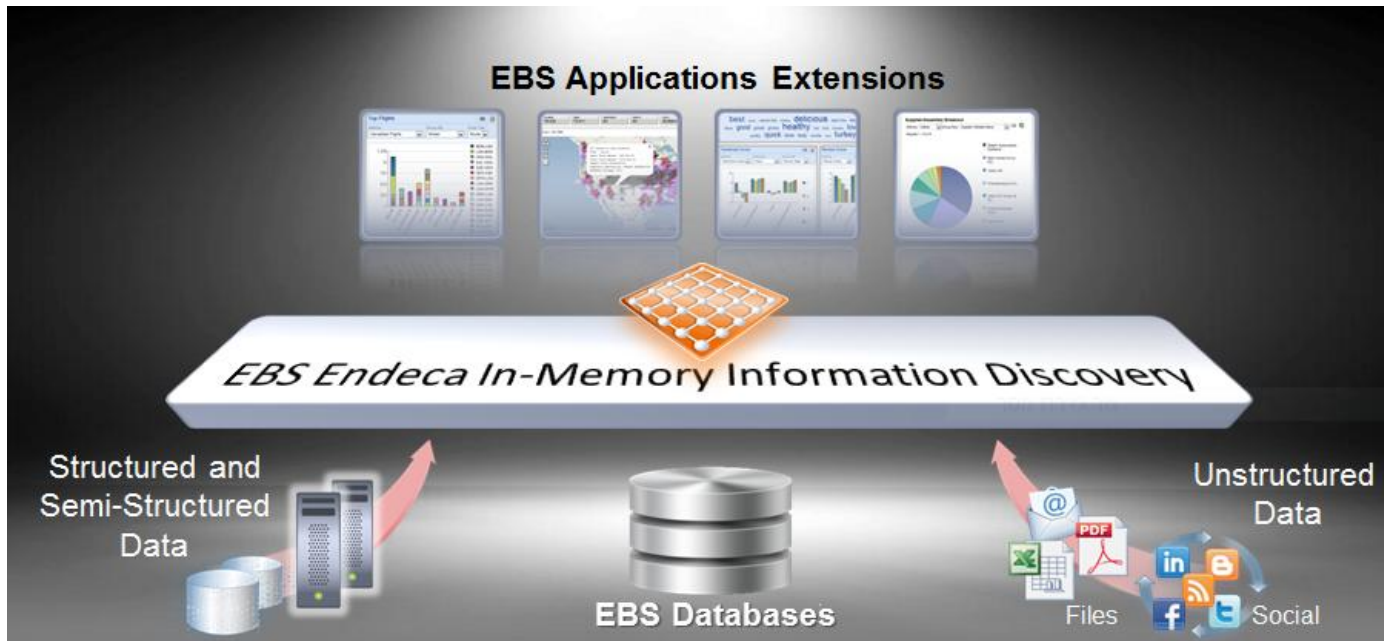
Advanced Search +
- Search across *all* data
- Dynamic typeahead
- Automatic spell correction
- Unlocks unstructured data

Contextual Navigation +
- **Data-Driven.** Freely browse data without predefined paths or writing queries
- **Interactive.** Shows only valid next steps
- **Easy to Use.** Familiar online experience

Visual Analysis
- Charts, crosstabs, key metrics
- Geospatial visualization
- Tag clouds

We will present data on products and integrators:

Package	Rep in Israel	Integrators	Sometimes we specify: Delivery model
Vendor A	Company 1	Integrator a, Integrator b	On-premise
Vendor B	Company 2	Integrator a, Integrator b, Integrator c	SaaS
Vendor C	Company 3	Integrator a	SaaS On-premise

- Most lists only include vendors that are represented in Israel
- The location within the lists is random (not a ranking)
- Lists might not include all players

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ERP Packages & Integrators: Part 1

Package	Israel Rep	Integrators	Delivery model
Oracle e-Business Suite	Oracle Israel	ONE1, Advantech, Yael, Unitask, Oracle consulting, HP, PWC, TATA (TCS Israel), Motorola	On-premise, **Some SaaS solutions** (i.e, HR, Sourcing etc.)
SAP	SAP Israel	Ness, IBM, Taldor, Advantech, Malam-Team, HP, TATA (TCS Israel), Accenture, Aman, Matrix, AKT (HR module), One1 (Xact), IGC (Financials), S.D.M, Yael, Convista Israel (SAP for Insurance)	On-premise (SAP ByDesign – **SaaS**)
SAP All-in-One	SAP Israel	Taldor, Advantech, Ness, Malam-Team (Malam Express), CBIT, SAPLM	On-premise (SAP ByDesign – **SaaS**)
SAP Business One	SAP Israel	Xioma, Complete, Menahel4U, Todan tech, BDO Ziv Haft, Ziv systems, RELS, Cloud: Triple C, Webox	On-premise, **SaaS**
E-Tafnit	Matrix	Matrix, Alpha Consultants	On-premise, **SaaS**
QAD	SIT	SIT, ManofIT, Tirosh	On-premise, **SaaS**
Priority	Ashbal	Ashbal, Meidatech, FBC Afek, Tulip, RAAN, HP, IlitERP	On-premise, **SaaS (w/Meida-Tech)**
Infor (M3)	Intentia Israel	Intentia Israel	On-premise
ONE ERP	ONE1	ONE1, Anagal, Y. Ovitz	On-premise, **SaaS**
KAV systems	Kav	Kav, Ardom	On-premise

ERP Packages & Integrators: Part 2

Package	Israel Rep	Integrators	Delivery Model
Microsoft Dynamics AX	Microsoft Israel. Distribution by Prodware	Prodware, Oregano, Maxsoft, Axperts, Almog, MCS	On-premise, SPLA model
Microsoft Dynamics NAV	Microsoft Israel. Distribution by Prodware	Prodware	On-premise
Aviv, MARS	Aviv	Aviv	On-premise
FinPro, Logistic Pro	Almog	Almog	On-premise
Gan Tochnot Heshev (Kibbutzim) Azimut (Car) ERP Plus (cross-sector)	Aman	Aman	On-demand, **SaaS-Israel**
Comax (on demand)	Comax		On-demand, **SaaS-Israel**
Netsuite	NetCloud		**SaaS**
Bgate	Bgate		On-premise, **SaaS**
IFS	Teldan		On-premise
ERP for municipalities	Automazia	Automazia	On-premise, **SaaS-Israel**
BPCS, Baan	Matrix	Matrix, Afek, IBM, Tulip (Baan)	On-premise

Israeli vendor positioning

Not a technological positioning, refers only to Israeli market, focused on the enterprise sector (not SMB)

- ▲ **X axis (Market Presence)**: Market penetration (sales + installed base+ clients perspective)

- ▲ **Y axis (Local Support)**: localization, support, Local R&D center, number and quality of SIs, etc.

- ▲ **Vendors to watch:** Israeli market new-comers

STKI positioning represents the current Israeli market and not necessarily what we recommend to our clients

Very large ERP projects (>300 users, large enterprises)
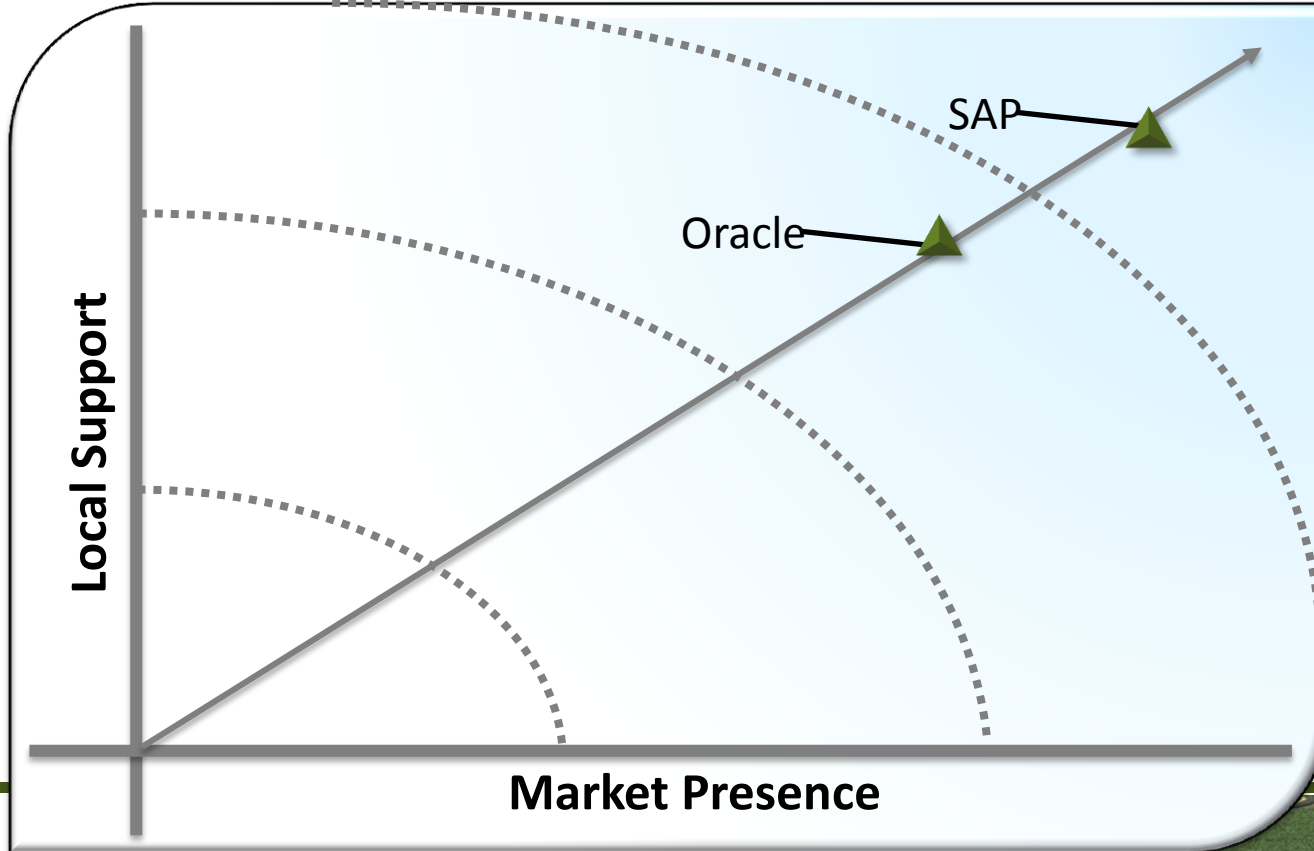
SAP

Oracle

Local Support

Market Presence

This analysis should be used with its supporting documents

Medium-Large ERP projects (~100-300 users, mid-large org.)
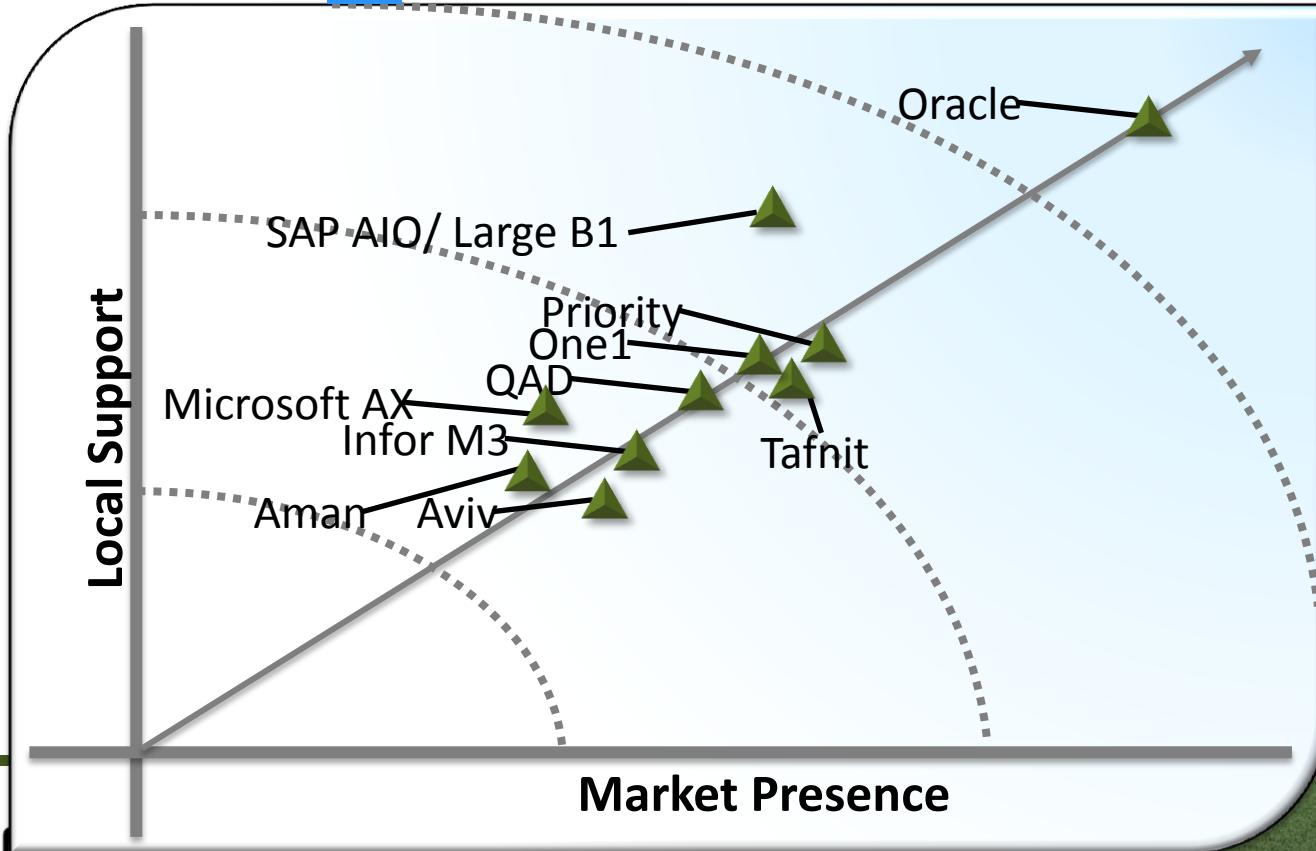
Oracle

SAP AIO/ Large B1

Priority

One1

QAD

Microsoft AX

Infor M3

Tafnit

Aman   Aviv

Local Support

Market Presence

This analysis should be used with its supporting documents

Small-medium ERP projects (~10-100 users)
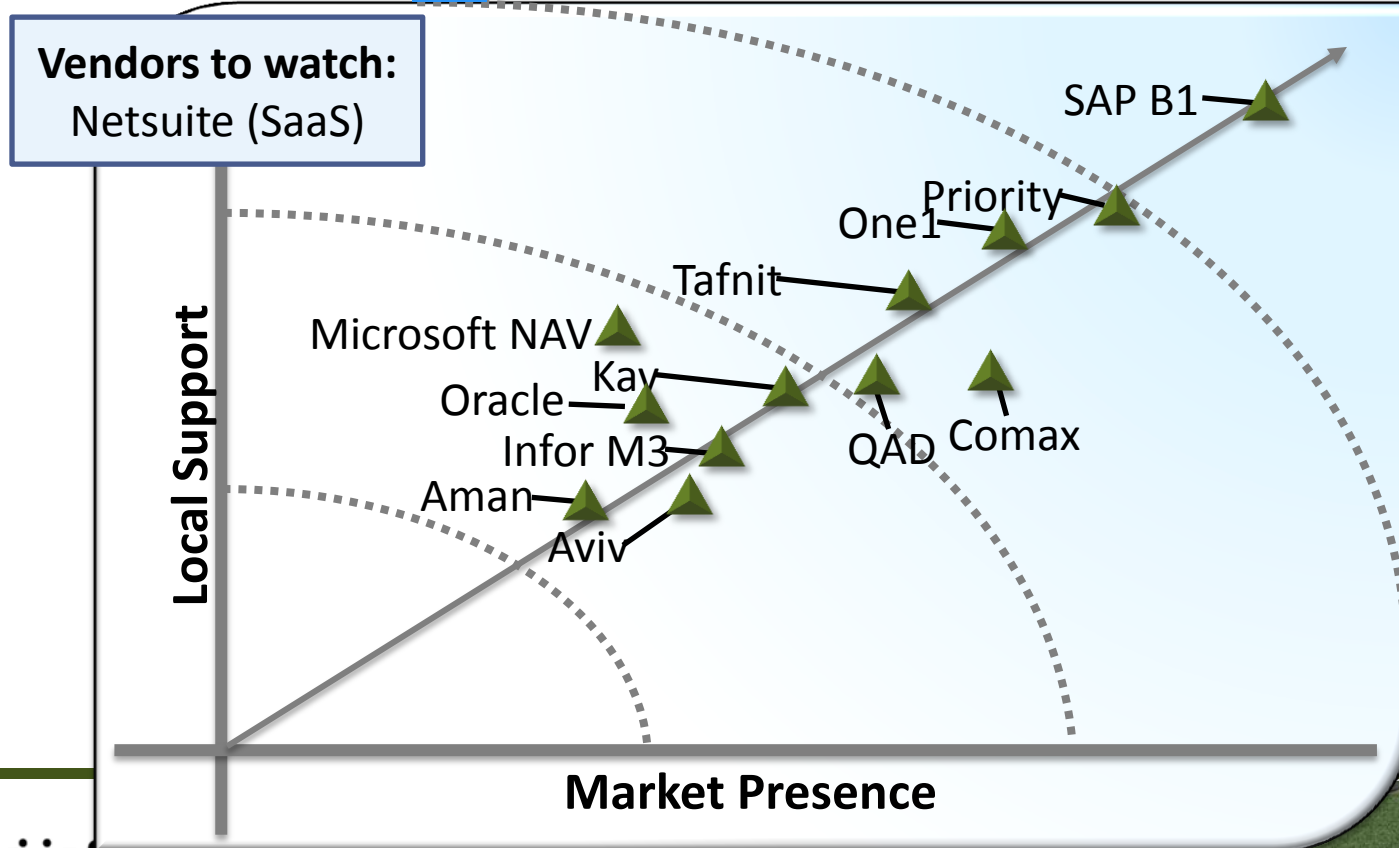
Vendors to watch:
Netsuite (SaaS)

SAP B1

Priority

One1

Tafnit

Microsoft NAV

Kav

Oracle

Infor M3

QAD   Comax

Aman

Aviv

Local Support

Market Presence

This analysis should be used with its supporting documents

❖Oracle: Isracard (One1), Fundtech (PWC), Even Keisar (Unitask), Soda Stream (Advantech), Ceragon (One1), Allot (Advantech), Phibro (Unitask), Defense organization

    ❖Upgrades R12: Open university (Yael), Ormat (One1), Rapa (Unitask), Sanfrost (One1), Rafael, Bezeq International, Orad, Applied Materials (One1)

    ❖Expansions/special modules: Tnuva Dairies logistics, Tnuva Mutagim, CAL – Advanced procurement, GRC; HOT Mobile – merge with Mirs; Objet – merge with Stratasys and rollout (Advantech); PLM (Agile) – Dialogic, SolarEdge, Bright Source, Syneron, Mobile Access, AVT, MER Group, RAD, Powermat, Audiocodes; Demantra – Pelephone

    ❖Fusion HCM: Bezeq International

    ❖Taleo: Defense organization

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Selected wins ERP – 2012 (Partial list)

❖**SAP:** Avgol (Advantech), PCB – All in One (Malam-Team), Camteck - All in One (Taldor), Mevaker Hamedina (Malam-Team), Machon Hatkanim (Ness)

  ❖<u>Expansions/ Modules</u>: Hagichon SAP OS (Malam-Team), Project Managememt module Netafim (Malam-Team), Bank Israel HR module (Malam-Team), Rakevet Israel PM moked and module (Malam-Team)

  ❖<u>Rollouts</u>: Gilat (Malam-Team), Diplomat (Malam-Team), Pma (Taldor)

  ❖<u>Upgrades</u>: Merkavim (Taldor), Albad (Taldor), Colmobil (One1 – Xact), Clal (One1 – Xact)

  ❖<u>Successfactors</u> (HCM – SaaS): Amdocs

Selected wins ERP – 2012 (Partial list)

❖**Aman:** Zameret Finance, Naamat-Histadrut,

❖**One1ERP**: Gderot, Modi Keramica, Halikud, Snack Time, Hevel Maon, Beit Haemek Biological Industries, Amicotube, Rosh Hashmal, Caesarea development company, Nie Eliyahu, Ramat Hakovesh, Yafe Hod, Ganigar, Negev Ceramics Marlog

❖**Microsoft:**

    ❖**NAV:** Lubinski (Prodware), Scheffer

    ❖**AX:** Dorad (Prodware), Hod Assaf, Of Oz, CEVA

    MIS, Kenes International, Kranot Hashotrim, Sodasko, Amot, Amsalem Touism

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ERP Consultants - Partial List

- Accenture
- Bit-Plus
- Daat (Eli Grumet)
- Deloitte Touche
- Ernst & Young
- Gabi Ron
- HMS
- IT Solutions
- Meteor

- Nextep (Hasas Bashan)
- OIC
- Seker
- That's IT
- TCS Israel - Tata
- Tulip
- Value Plus (SAP)
- Several Independent advisors
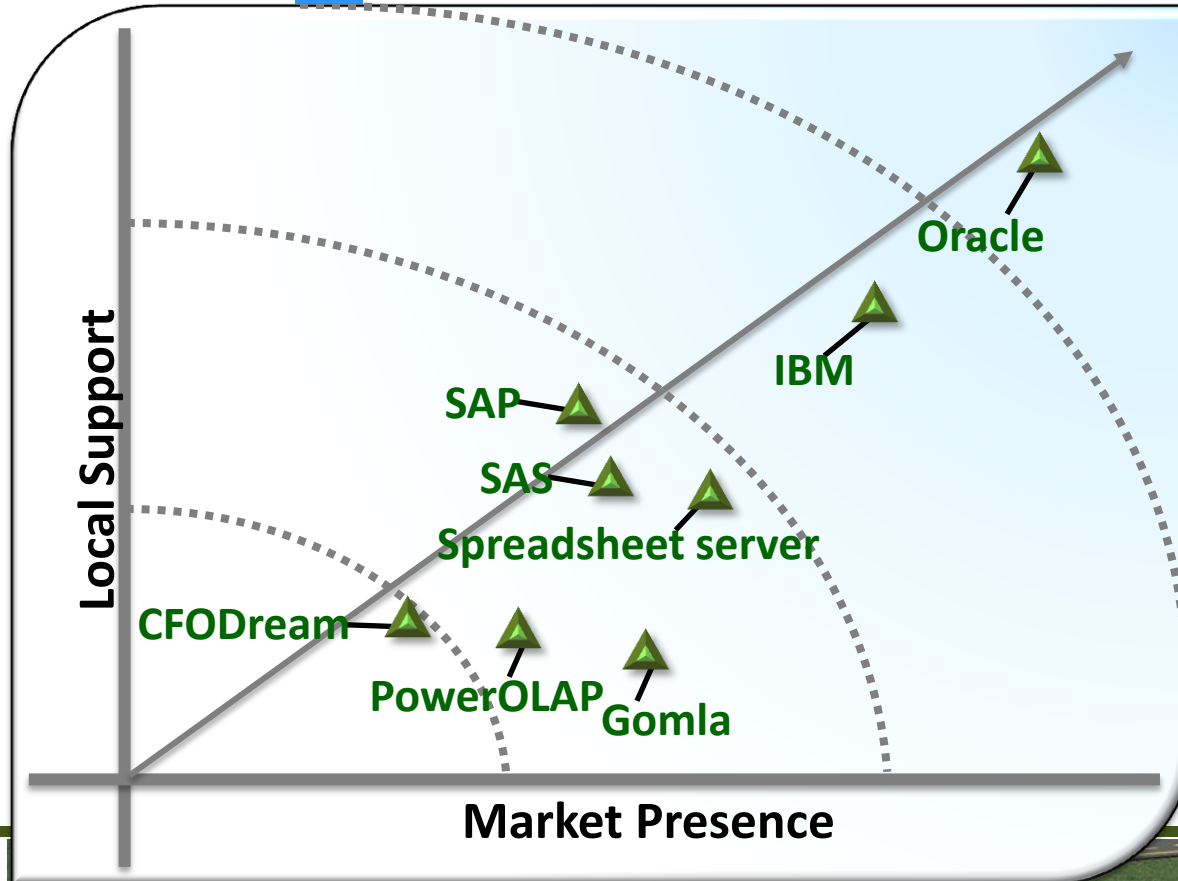
Consultant Services

(Alphabetical order, not a ranking!)

EPM packages
Budget Planning, report consolidation, financial disclosure

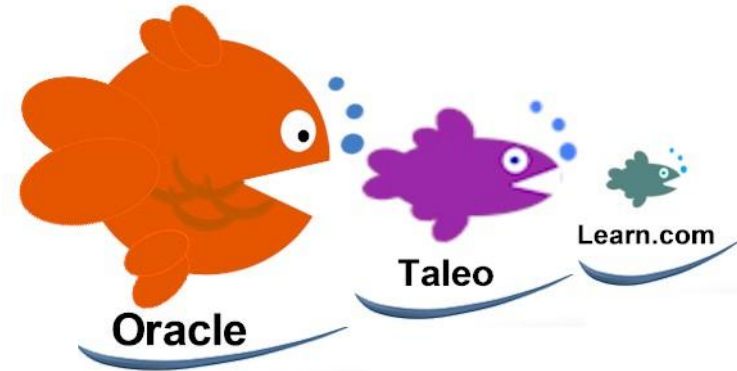| Package	Rep in Israel	Integrators
Hyperion - Oracle	Oracle Israel	HMS, Business & Decisions, Nellarmonia, Oracle consulting
IBM – TM1	IBM Israel	Byconix, Ernst & Young, Ness-Gilon, Libi
IBM - Cognos planning	IBM Israel	Libi, Ness-Gilon
IBM - Clarity	IBM Israel	Tulip, Libi
SAP BPC + SM	SAP Israel	Ness, IBM, HP, Advantech, HMS, Malam-Team, Opisoft, Matrix, Ness
Power OLAP	Top-IT (Opisoft), Xioma	Top-IT (Opisoft), Gilon
SAS	Mia computers	Mia computers
CFODREAM	The 7th Dimension	The 7th Dimension
Global - Spreadsheet server (Spreadsheet automation)	Yael software	Yael Software
Gomla (mainly Costing)	Gomla	Gomla
Palo (open source OLAP)		Ness

EPM tools Israeli positioning - 2013

Local Support

Market Presence

Oracle

IBM

SAP

SAS

Spreadsheet server

CFODream

PowerOLAP

Gomla

This analysis should be used with its supporting documents

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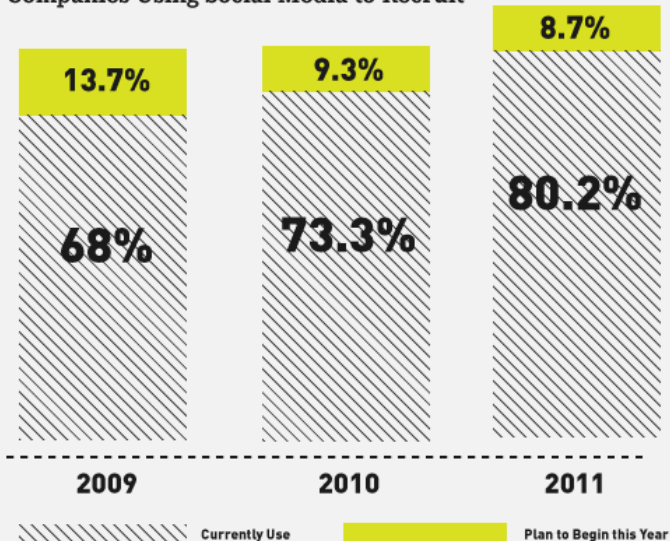IT Knowledge Integrators

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RECURITING THROUGH SOCIAL MEDIA

SOCIAL NETWORK RECRUITING GROWTH

Companies are increasingly using social networks to recruit new talent, not just new customers.

Companies Using Social Media to Recruit

2009	2010	2011
13.7%	9.3%	8.7%
68%	73.3%	80.2%

⬛ Currently Use 🟨 Plan to Begin this Year

SUCCESS!

Companies are finding a high level of success using social media to recruit.
Have you successfully hired through social media?

64% say YES* | 36% say NO

*up from 58% in 2010

RECESSION, WHAT RECESSION?

According to a Jobvite Social Recruiting Survey, in 2011, businesses plan to increase their budgets for social recruiting by

55%

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❖ Renewed interest in HR systems, recruitment and LMS

❖ About 6 different tools deployed in a typical organization

  ❖ Time and attendance, payroll, HR, LMS, Employee records, recruitment…

❖ Preference to suites that include all integrated capabilities

❖ SaaS is catching on

❖Challenges:

    ❖Lack of budget

    ❖Most orgs don't perceive HCM as strategic or important

    ❖Culture conflict – IT thinks "HR people aren't living and breathing data"
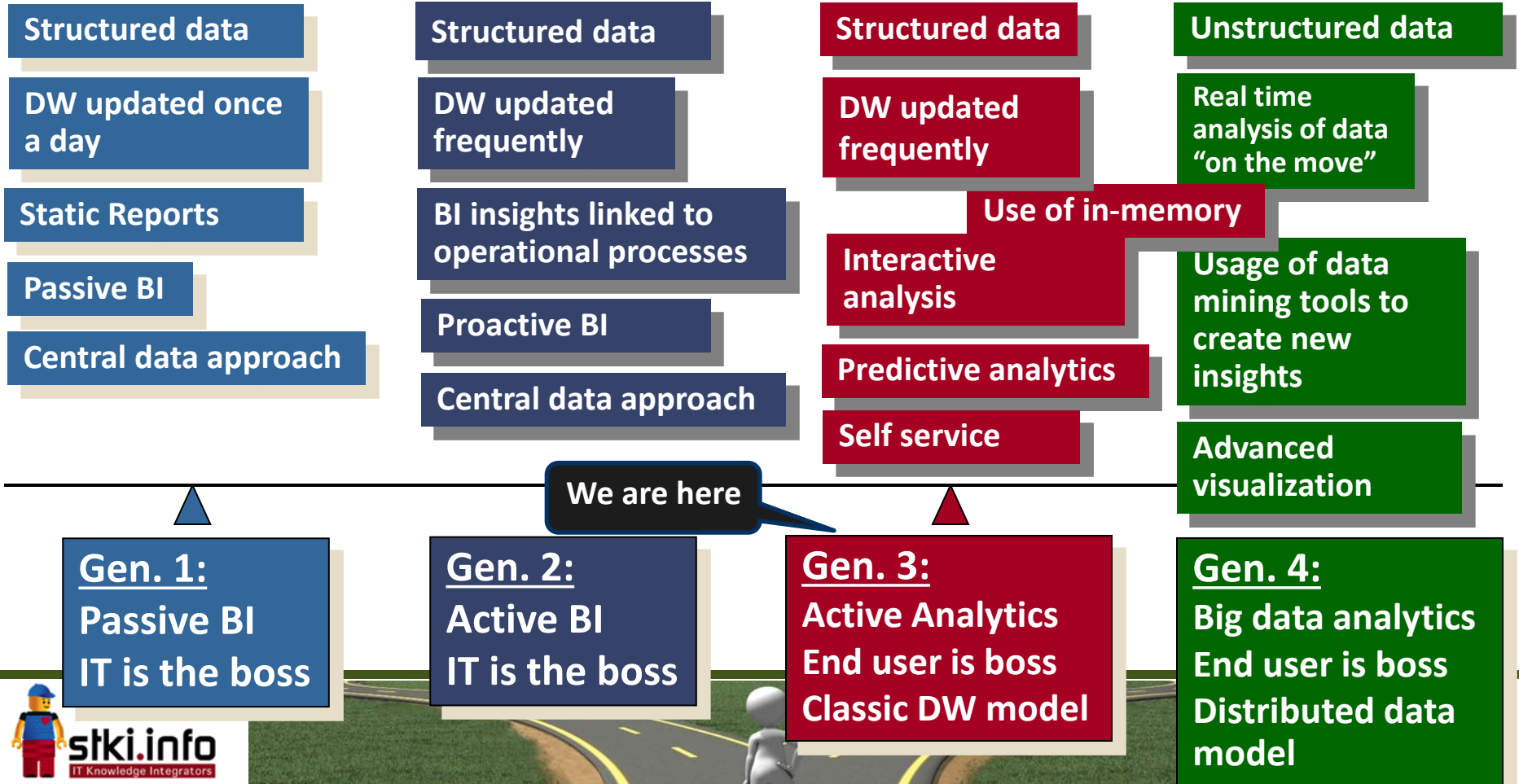
CHANGES AHEAD

BI, Analytics & Big Data

NEW LIFE in Progress

Analytics & BI Generations

Structured data

DW updated once a day

Static Reports

Passive BI

Central data approach

Structured data

DW updated frequently

BI insights linked to operational processes

Proactive BI

Central data approach

Structured data

DW updated frequently

Use of in-memory

Interactive analysis

Predictive analytics

Self service

Unstructured data

Real time analysis of data "on the move"

Usage of data mining tools to create new insights

Advanced visualization

We are here

Gen. 1:
Passive BI
IT is the boss

Gen. 2:
Active BI
IT is the boss

Gen. 3:
Active Analytics
End user is boss
Classic DW model

Gen. 4:
Big data analytics
End user is boss
Distributed data model

❖ One of the most adopted technologies (after ERP) - 68% of large organizations (Source: Computer Economics)

❖ But still one of the most <u>innovative areas</u>

❖ Next few years will focus on analytics, self service, visualization

❖ What about big data?

   ❖ Big data will "meet" these trends and empower them

   ❖ Will be an enabler for new type of analytic solutions

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Big data's 3 I's (as opposed to the 3 V's)

3 I's Of Big Data

1) Immediate - you need to do something about it now

2) Intimidating - what if I don't?

3) Ill-defined - what is it, anyway?

Note: Vance Loiselle, CEO of Sumo Logic, described Big Data as immediate, intimidating, and ill-defined. With a nod to the 3 V's of Big Data (volume, velocity, and variability), I have coined these the 3 I's of Big Data.

Source: http://www.forbes.com/sites/davefeinleib/2012/07/24/big-data-trends/

❖ The top performers ("high digital IQ") will lead the way into big data, and they are preparing for it

Harnessing "Big Data" will give my organization a competitive edge. (Answers represent those who said "agree" and "strongly agree")
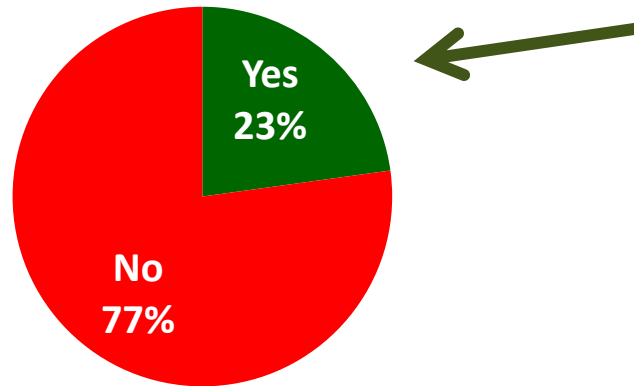
83%

Source: PWC Digital IQ survey

Source: http://www.forbes.com/sites/davefeinleib/2012/07/24/big-data-trends/

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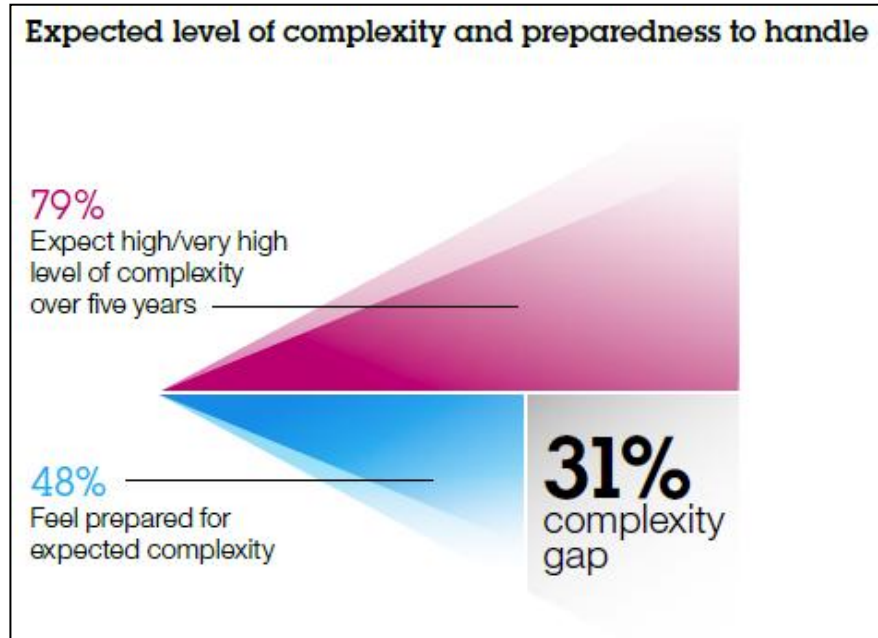**My organization will enter into a big data project**

Yes 23%

No 77%

Leading companies will start and the rest will follow

Source: STKI Survey 2013

We now create as much information every two days as we did from the dawn of civilization to 2003 (Source: IBM CMO Study)
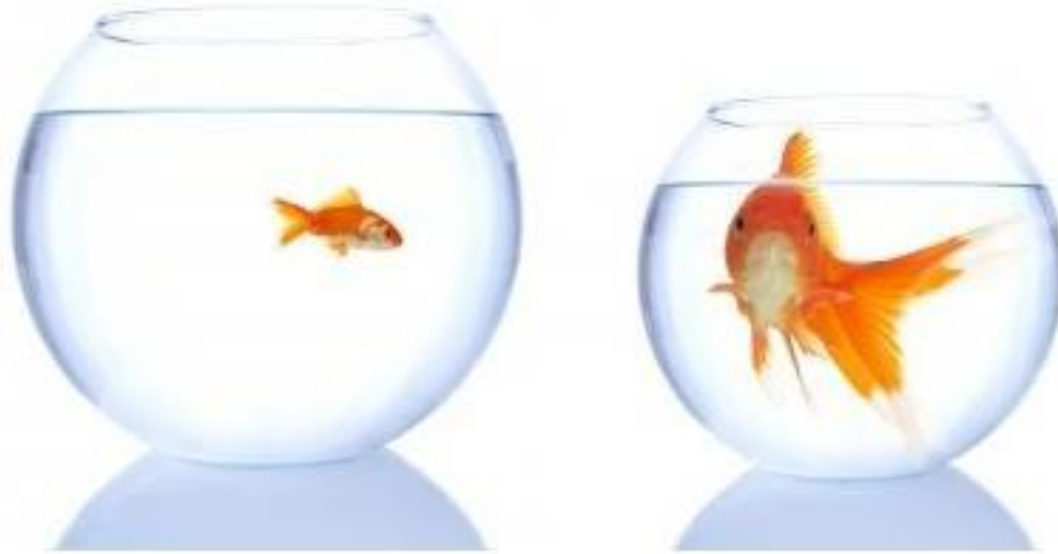

Expected level of complexity and preparedness to handle

79%
Expect high/very high level of complexity over five years

48%
Feel prepared for expected complexity

31% complexity gap

Top 3 concerns:
- Data explosion
- Social media
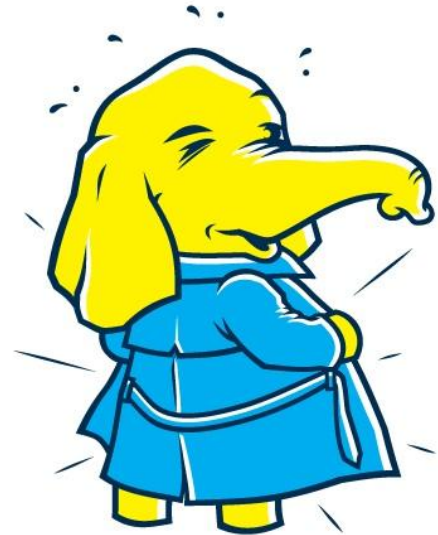- Growth of channel & device options

Source: IBM CMO study

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Is Small the new Big?

- ❖Big data is less relevant, right data is most important: how to get the right data in real time?
- ❖It's what you do with the data that makes the difference
- ❖The challenge :convert data into **actionable** info.
- ❖Data Scientists will play the most important role

Data Scientist

The Hottest Job You Haven't Heard Of

- **Salary: $140K - $200K**
- Major staff shortage:
  - <u>McKinsey</u>: By 2018, the U.S alone could face a shortage of 140,000-190,000 people (2008-2018: 10 years cycle for next gen. graduates)
  - <u>Gartner</u>: By 2015, big data demand will generate 1 million jobs in G1000 but only one- third of those jobs will be filled
  - <u>Informationweek</u>: **18%** of big data-focused companies want to increase staff by **30%** in the next two years, **53%** expect it will be hard

Big Data Scientist

אזור: מרכז

קוד: JB-7649   ניהולית: לא

תיאור המשרה:

לחברה בינלאומית ומצליחה, המפתחת מוצר בתחום המסחר האלקטרוני,
דרוש/ה מפתח/ת JAVA- לעבודה בסביבה מאתגרת, באמצעות
טכנולוגיות חדישת ועבודה עם- Big Data.

דרישות התפקיד

- B.Sc במדעי המחשב/ בוגר/ת יחידה טכנולוגית.
- לפחות שלוש שנות ניסיון בפיתוח ב- JAVA.
- ניסיון בפיתוח ב- Perl או ב- Python.
- ניסיון בטכנולוגיות Spring/ JDBC/ ORM/ Hibernate, Java App
servers/ Servlet.
- עבודה למול DB ושימוש בפרוטוקולים SOAP, IMAP, SMTP,
HTTP SIP, H323, TCP/IP.
- ניסיון בפיתוח אלגורתמים בתחומי ה- NLP או Machine learning-
יהווה יתרון.
- ניסיון בעבודה עם NoSQL/ Hadoop- תהווה יתרון

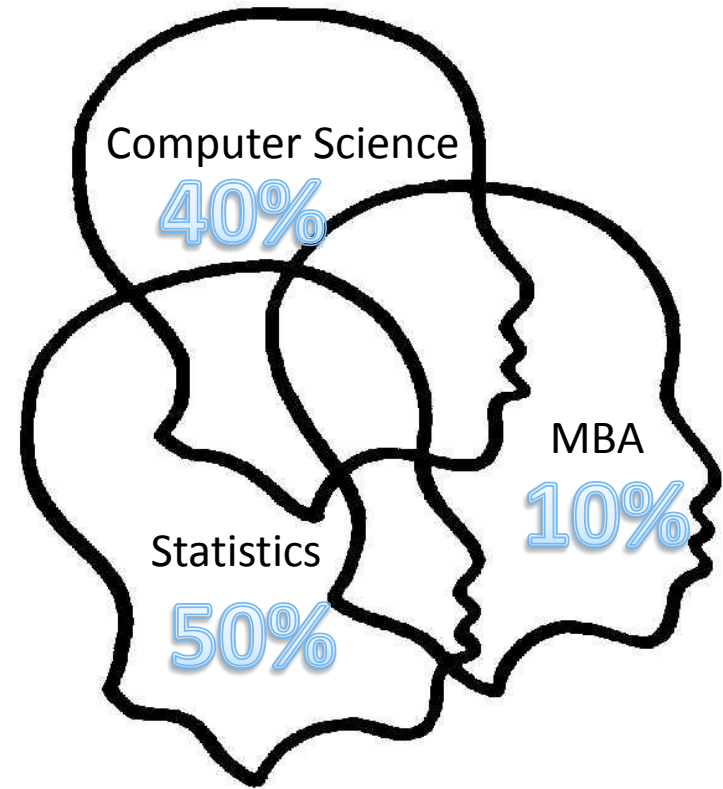Linked in   שלח פרופיל   שלח קורות חיים

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❖Skills (cross-disciplines):

  ❖Structured & unstructured data

    (also from real-time streams)

  ❖Java programming

  ❖Statistics

  ❖Machine-learning algorithms

  ❖NLP

  ❖Business concepts (MBAs)

Computer Science
40%

MBA
10%

Statistics
50%

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An open source toolkit for the data scientist

Welcome to the Data Science Toolkit
Truly open tools for data.

Text to Sentences
API: /text2sentences
Removes the parts of the text that seem to be boilerplate, leaving the real sentences.

Try it for yourself. Copy and paste a large chunk of text into the box below to see what sentences it identifies.

[Get Sentences]

File to Text
API: /file2text
Converts PDFs, Word Documents, Excel Spreadsheets to text.
Recovers text from JPEG, PNG or TIFF images of scanned documents

Try it for yourself. Upload a file to see what text it finds.

[Browse...]

[Extract Text]

Street Address to Coordinates
API: /street2coordinates
Street Address to Location calculates the latitude/longitude coordinates for a postal address. Currently restricted to the US and UK.

Try it for yourself. Copy and paste some addresses into the box below to see what locations it

[Browse...]

[Locate Addresse]

HTML to Story
API: /html2story
Takes an HTML document representing a news article o text.

Try it for yourself. Copy and paste your HTML into the b

[Extract Story]

Text to People
API: /text2people
Spots text fragments that look like people's names or titles, and guesses their gender where possible.

Try it for yourself. Copy and paste your text into the box below to extract people's names.

[Find Names]

Text to Tim
API: /text2times
Spots text fragment

Try it for yourself. C

[Find Times]

Source: http://www.datasciencetoolkit.org/

Kaggle: data scientists outsourcing via competitions

Thousands of experts from 100 countries and 200 universities

What's in your data?

Improve Healthcare, Win $3,000,000.

Participate in competitions

Kaggle is an arena where you can match your data science skills against a global cadre of experts in statistics, mathematics, and machine learning. Whether you're a world-class algorithm wizard competing for prize money or a novice looking to learn from the best, here's your chance to jump in and geek out, for fame, fortune, or fun.

Join as a participant

(Need convincing?)

Create a competition

Kaggle is a platform for data prediction competitions that allows organizations to post their data and have it scrutinized by the world's best data scientists. In exchange for a prize, winning competitors provide the algorithms that beat all other methods of solving a data crunching problem. Most data problems can be framed as a competition.

Learn more about hosting

What could the world's best analysts find in your data?

Big data can generate significant financial value across sectors

US health care
- $300 billion value per year
- ~0.7 percent annual productivity growth

Europe public sector administration
- €250 billion value per year
- ~0.5 percent annual productivity growth

Global personal location data
- $100 billion+ revenue for service providers
- Up to $700 billion value to end users

US retail
- 60+% increase in net margin possible
- 0.5–1.0 percent annual productivity growth

Manufacturing
- Up to 50 percent decrease in product development, assembly costs
- Up to 7 percent reduction in working capital

SOURCE: McKinsey Global Institute analysis

Source: http://www.mckinsey.com/insights/mgi/research/technology_and_innovation/big_data_the_next_frontier_for_innovation

Other
- Sentiment Analysis
- Text analysis
- Who's talking to whom?

Law Enforcement, Defense & Cyber Security
- Real-time multimodal surveillance
- Situational awareness
- Cyber security detection
- Crime early warning system

Transportation
- Intelligent traffic management
- Weather and traffic impact on logistics and fuel consumption

Call Centers
- Voice-to-text mining for customer behavior understanding

Fraud Prevention
- Detecting multi-party fraud
- Real time fraud prevention

Telecommunications
- CDR processing
- Social analysis
- Churn prediction
- Geomapping
- Operations and failure analysis from device, sensor, and GPS inputs

Behaviour Analysis
- Integrated customer behavior modeling
- Analyze internet behavior and buying patterns

Example of Big Data analytics usage (Source: SAS)

## INDUSTRY ISSUES | BIG DATA "SOLUTION" OPPORTUNITIES

Industry	Business Issue
Insurance	Telematics, Claims Analytics, Ratemaking, Catastrophic Modeling
Banking	Customer Analytics, Dynamic Pricing, Fraud Scenarios and Exposures
Telecommunication	Collection Scoring, Bill Shock Avoidance, Network Detection and Repair
Government	Tax Fraud/Collections, Criminal Justice, Pension Portfolio Risk, Child Support Arrears/Delinquencies
Manufacturing	Predictive Asset Failure, Inventory Allocation Optimization
Healthcare	Clinical Quality and Safety, Customer Centric Insurance, Claims Analytics
Life Sciences	Clinical Trials and Simulation, Personalized Medicine
Cross-Industry	Customer Analytics incl. segmentation, acquisition, and churn

§sas | THE POWER TO KNOW.

Telematics car insurance

1. An ingenie telematics box is fitted out of sight in the car - collecting data on how the car is driven

2. Data is then transmitted from the box to secure servers via the Orange network, allowing us to assess your driving style

3. We send you feedback on your driving which is available via the ingenie app or online

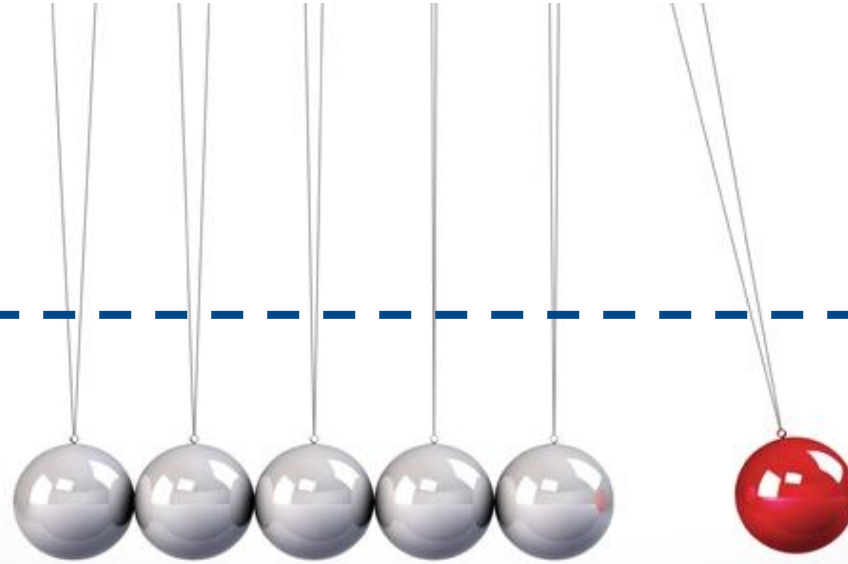4. We give discounts to our best and most improved drivers, so drive well and you could pay less

Source: http://www.ingenie.com/telematics
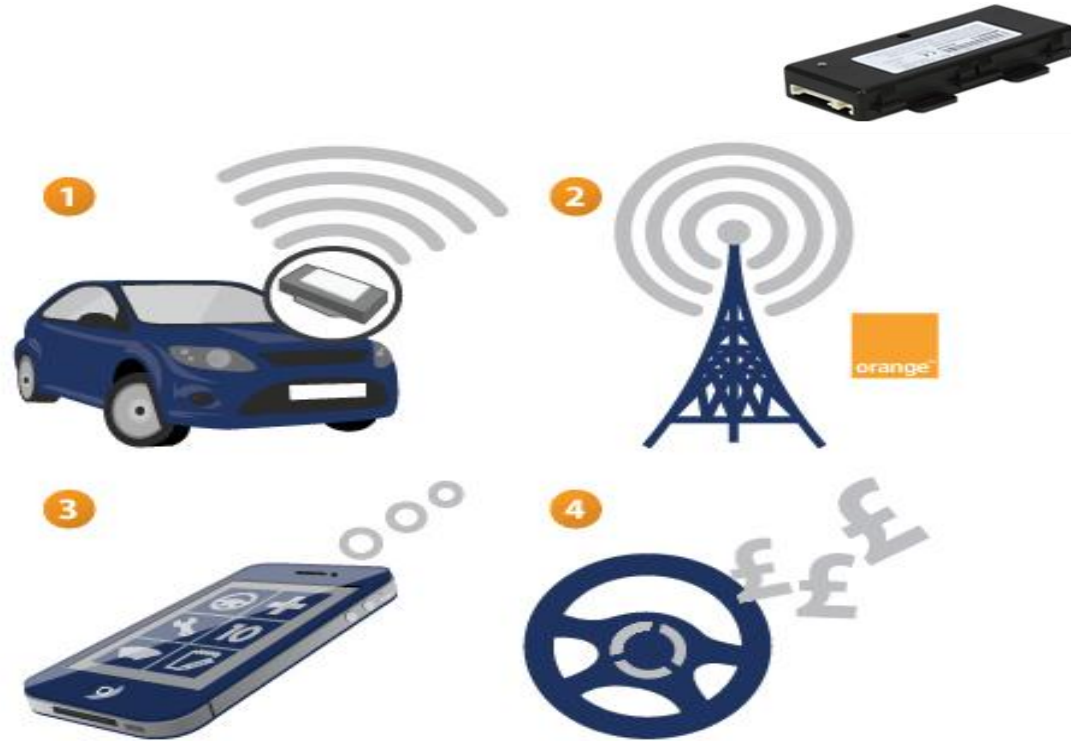
Internet of things

❖ Will be THE driver for big data transformational "WOW" projects:

   ❖ Real usage-based pricing (Insurance, taxes)

   ❖ Smart city

   ❖ Health management

   ❖ Weather…

1. IT controls BI

2. Business
users control BI

3. IT will establish best
practices and COE

66

❖ Business users will be the owners of BI and analytics

❖ By 2014, 40% of BI purchasing will be business-led (Gartner)

❖ IT will focus on data quality and access + effective channels to BI

❖ Benefits: operational efficiency for IT (reporting and analysis done by LOBs), agility, usability, relevance, fast deployment

❖ The price: consistency, integration, central control

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Roles and organization of the BI department will change

❖Less people creating reports at the BI department

❖More BI will be done in LOBs by analysts / key users and hopefully new types of users – knowledge workers (self service)

❖BI department will focus on:

  ❖Data governance, central definitions and models

  ❖Data quality issues

  ❖Center of Excellence for guiding users

  ❖Creating effective channels to access the data

    ❖ Search based BI portal

    ❖Visualization tools

    ❖Self service

    ❖Data discovery
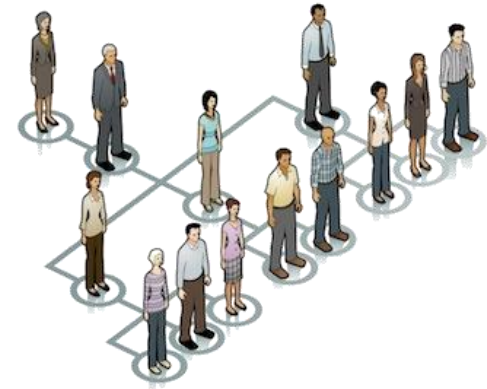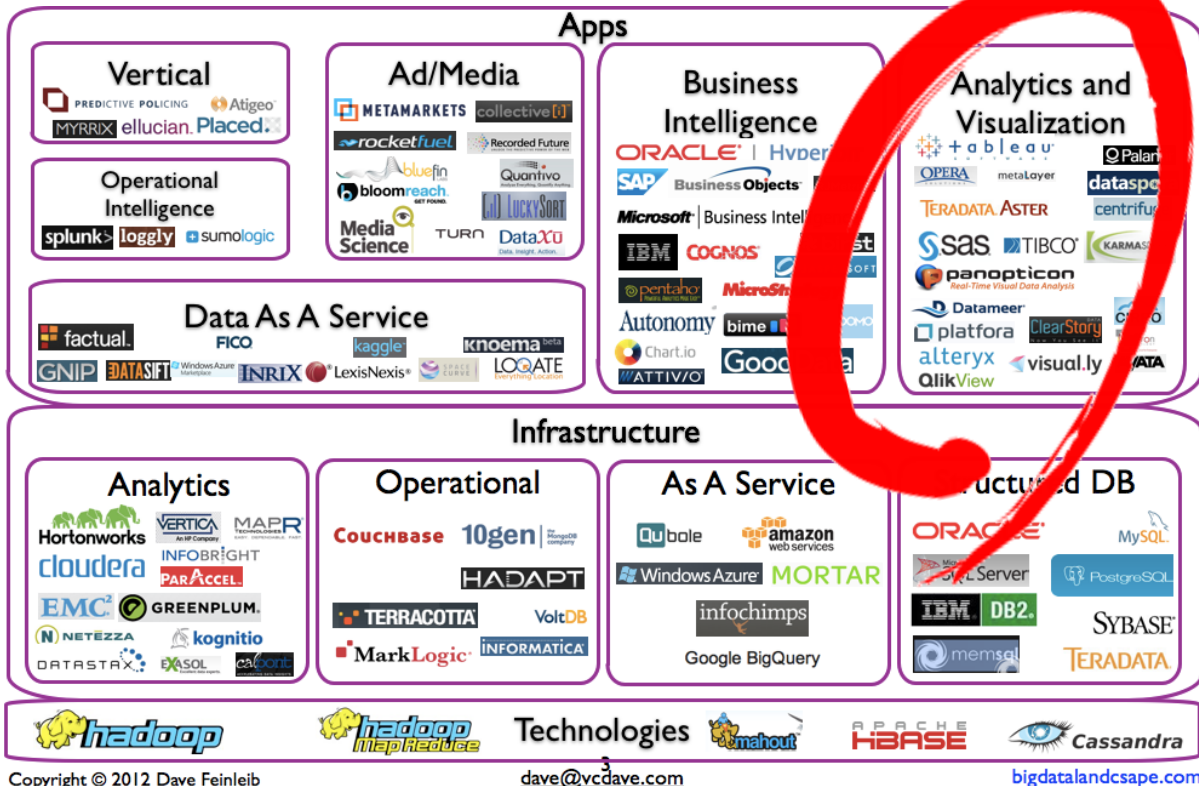
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Data explosion!

It's tough to make predictions, especially about the future
(Yogi Berra)

❖From descriptive to diagnostic (Gartner)

❖From "what happened" to "what is likely to happen"?

❖From queries to discoveries

Analytics is king

3D visualization

Design = navigation

Animation!

Information design

Interactive analysis

* Recommended reading:

TED Talk by David McCandless (Information is beautiful blog):

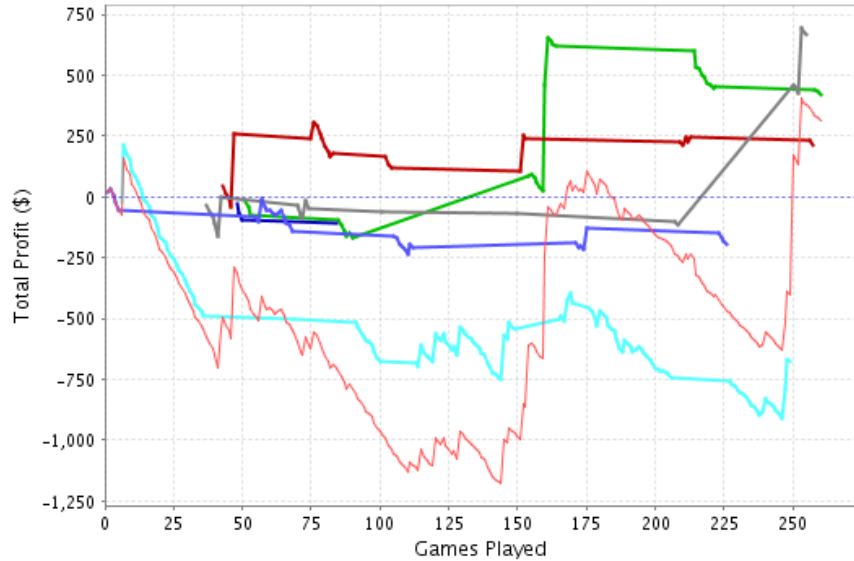http://www.ted.com/talks/david_mccandless_the_beauty_of_data_visualization.html

David McCandless

"let the dataset change your mindset"
- Hans Rosling

BI reports will look less like this:
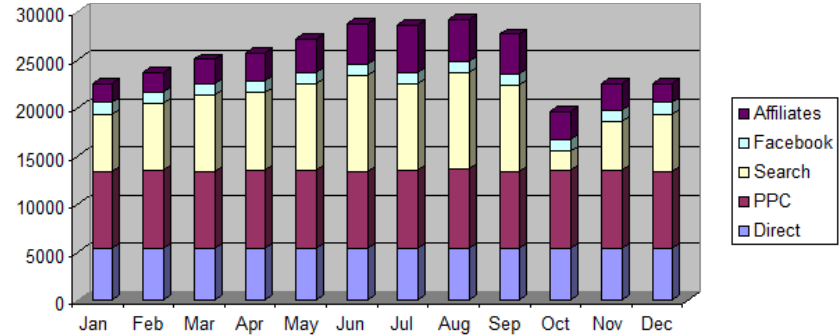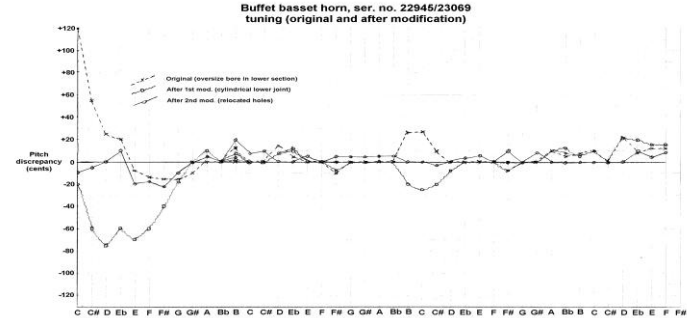
And more like this:
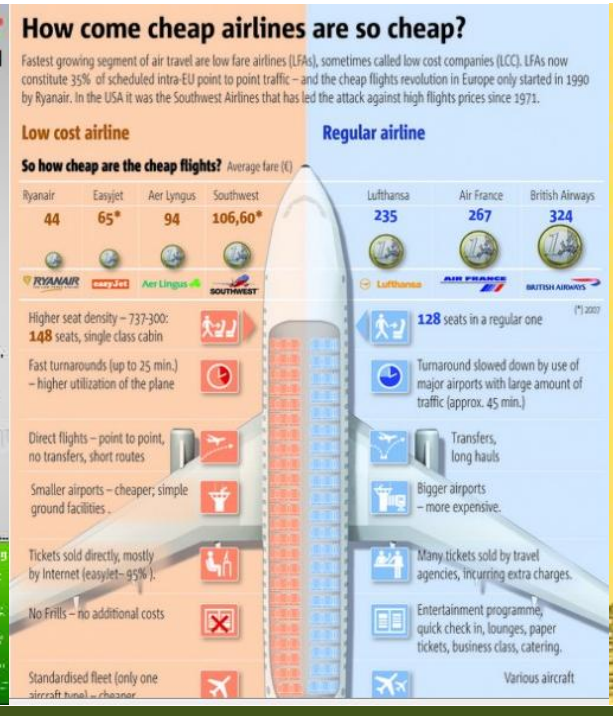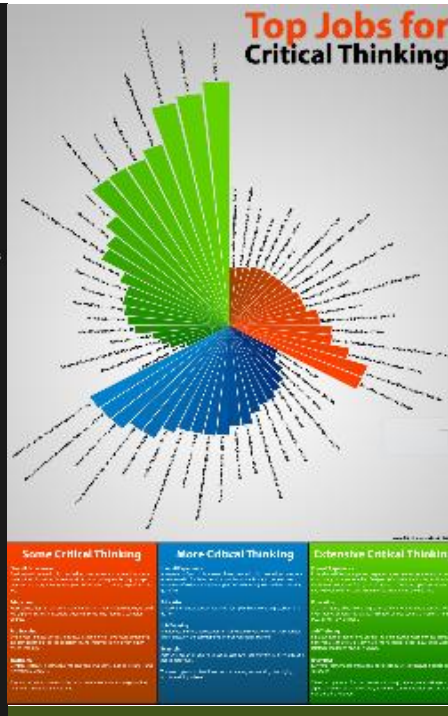
Telling Stories with Data

Our infographics and data visualizations tell your story, drive traffic, and amplify your social media presence.

Visual storytelling
Consumer-level ease of use

Piktochart

pick a theme

JOIN
200,000 USERS
AT MAKING INFORMATION BEAUTIFUL

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Source: http://infosthetics.com

One Week of Twitter Conversations by People Working at Twitter

Impressive visualization examples

(Animated) OrgOrgChart: The Dynamic Organization of Autodesk (8000 employees) over 4 years

Source: http://infosthetics.com
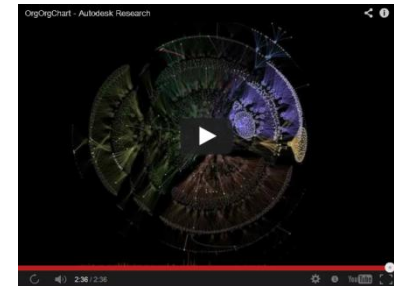
❖Traditional BI portal: a single place where all reports are organized by categories

❖Search based BI portal: a user enters keywords that describe the information.

Israeli project 2012 example: Harel (Eternity)

BI & Analysis General Platforms (Part 1):

Package	Rep in Israel	Integrators
SAP BW + SAP Business Objects, Predictive Analysis (new)	SAP Israel	Matrix BI, Advantech, Taldor, Malam-Team, One1 (+Xact), Ness-Gilon, Skywind, Consist, Point of View, IBM, Data Cubes, VisionBI, Active View, HP, Eternity, BICS, Xioma, Opisoft
Microsoft (SQL, Excel, SPS, PowerPivot)	Microsoft Israel	Eternity, Opisoft, Ness-Gilon, ONE1 BI, Matrix BI, Consist, Advantech, Bynet SW, Elad, Malam-Team, Libi, Top-soft, Enix (Experis), Data Cube, Vision BI, MCS, Verasiti, Naya, SolidBI, MOSS partners
IBM – Cognos	IBM Israel	Libi, Opisoft, Seven-D, Ness-Gilon, Consist, Eternity, Advantech, IBM, Mirkam (Energy), Malam-Team, ONE1 BI, Normative, Eltel, Matrix BI
IBI - WebFOCUS	Omnitech (SRL)	Malam-Team, Ness-Gilon, ALD
Oracle OBI EE	Oracle Israel	Oracle Consulting, Taldor, Ness-Gilon, Data Cube, Vision BI, Enix (Experis), Business & Decisions, Advantech, Eternity, Yael, IBM, ONE1 BI, Malam-Team, Matrix BI
Oracle BI Apps (prepackaged BI for Oracle ERP, Siebel etc.)		
Point of View 2008	Point of View	Consist, DBNet, Ness Matach, BDO
Pyramid Analytics	Malam-Team	Malam-Team, Eternity, Normative, VisionBI, Datacube, Opisoft

BI & Analysis General Platforms (Part 2):

Package	Rep in Israel	Integrators
SPSS	IBM	Genius, IBM - GBS, Matrix BI
SAS	Mia Computers	Mia computers, Ness-Gilon, Pareto, HMS, Antropy, Liran Lavi, Goldmines
Panorama Novaview, Necto	Panorama	Matrix BI, Ness-Gilon, Consist, Data Cube, ONE1 BI, Business Solutions, Citrine BI, VisionBI, Eternity, Opisoft
Microstrategy	Mittwoch	Mittwoch
Sisense	One1	One1
Mulecular BI (based on Microsoft CRM + Microsoft BI)	Advantech	Advantech
Pentaho (Open source BI)		Eternity, Tikal, Malam-Team
Palo (Open source BI)		Ness-Gilon
Jaspersoft (Open Source BI)		
R Statistics (Open Source Analytics)		

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Data discovery and Visualization tools:

Package	Rep in Israel	Integrators
Qlikview	Hilan	Qlikview Israel, Datamind, Complete ,Tirosh , Servit ,Enix (Experis), Ludan, Libi, FBC, Qset, Green House, Oregano,Menahel4U, Anagal, DtBit,Contel Ness-Gilon, ONE1 BI, Malam-Team, MatrixBI
Spotfire (Tibco)	Yael Software	Yael Software, Ness-Gilon
Tableau	SIT, Gstat	SIT, Gstat, VisionBI, Consist
Microstrategy Visual Insight	I.E Mittwoch	I.E Mittwoch
New - SAP Visual Intelligence	SAP Israel	
New -Oracle Endeca Information Discovery	Oracle	
Dundas - Visualization	Matrix	Matrix
Microsoft - Powerview	Microsoft	Microsoft BI partners
IBM – Cognos Insight	IBM	Libi, other Cognos implementers
New - SAS Visual Analytics	Mia computers	Mia computers

Front end BI and data discovery tools - 2013

New players to watch:
- ▲ **Oracle Endeca**
- ▲ **SAP Visual Intelligence**
- ▲ **Sisense** (One1)
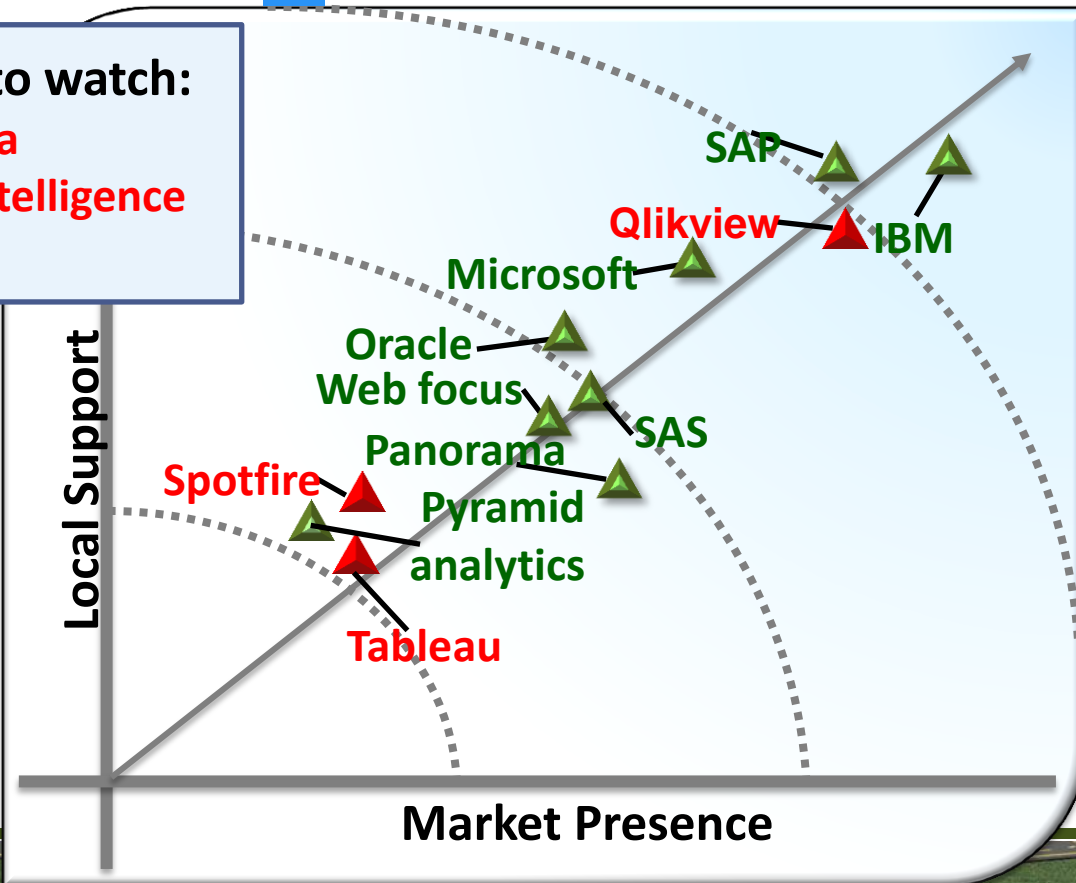
▲ **BI**

▲ **Data discovery**

* This distinction will soon be irrelevant

This analysis should be used with its supporting documents

SAP

Qlikview

▲ **IBM**

Microsoft

Oracle

Web focus

SAS

Panorama

Spotfire

Pyramid analytics

Tableau

Local Support

Market Presence

Analytic & data mining tools - 2013
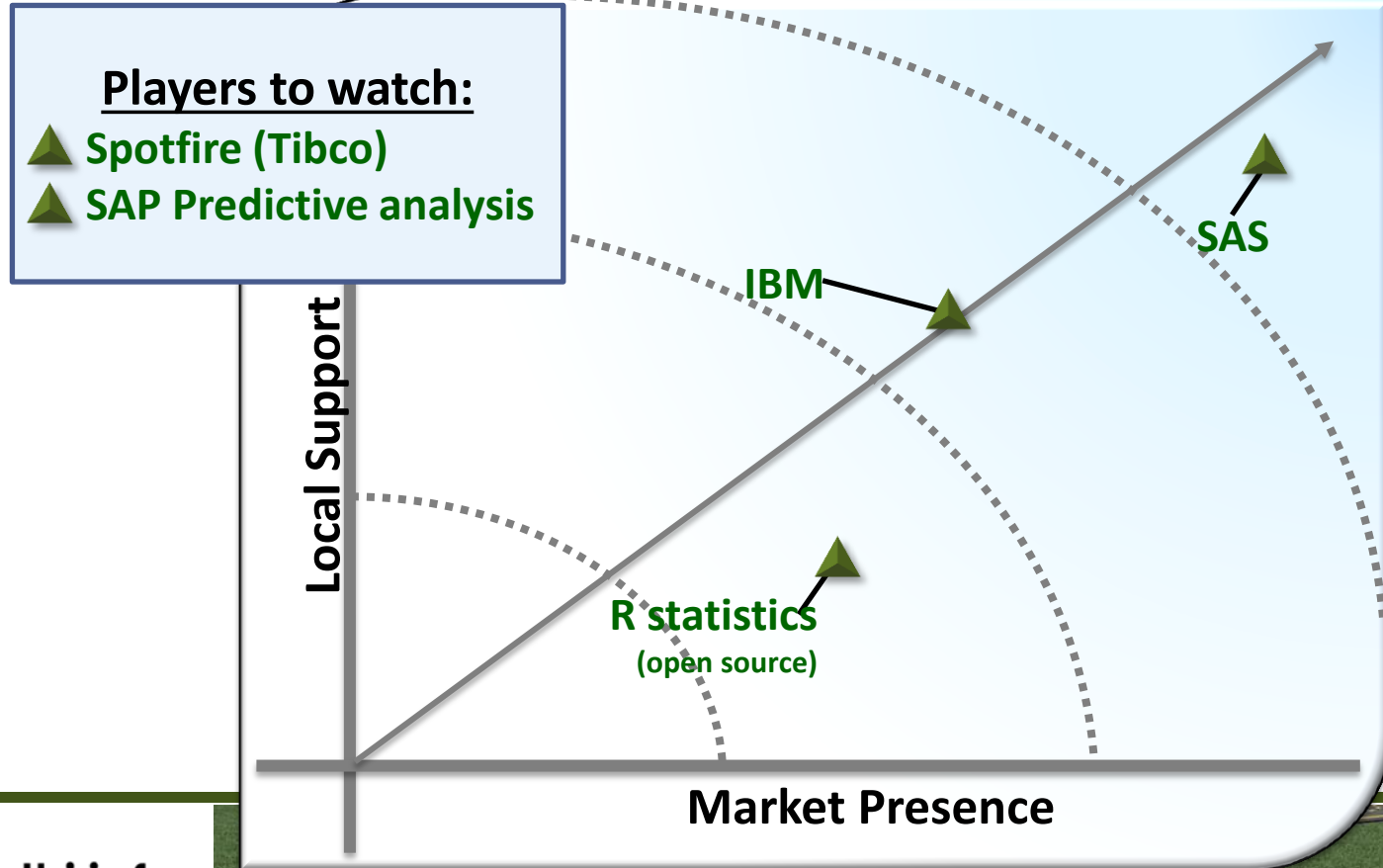
Players to watch:
- 🔺 **Spotfire (Tibco)**
- 🔺 **SAP Predictive analysis**

SAS

IBM

Local Support

R statistics
(open source)

Market Presence

This analysis should be used with its supporting documents

❖ **BI 4 – Business Objects:** Haifa university, Bank Leumi, Bank Poalim, Harel, Sonol, M. of Health (BO on BW – Malam-Team), Bank Israel – for SAP HR, Teva, Camtech, Diplomat, PCB, Mekorot, Merchav (of Keter), Palram, Maccabi, IEC, Migdal, IDF, Gilat, Sonol, Bank Leumi Lemashkantaot (Ness) – new project, 888 (Matrix), Paz (Matrix), Telzer communication 019 (Matrix), Amdocs (Matrix), Nice (Matrix), Comverse (Matrix)

    ❖ Mobile BI – Sonol, Paz, Fiat, Coca Cola, Novolog, Diplomat

❖ **Oracle:** BI Apps – Plasson (Ness-Gilon)

❖ **Cognos:** Ten10 (Malam-Team), Teva (Malam-Team, Libi, Matrix), expansions and projects in Harel (Libi), Bank Poalim (Libi), Orbotech (Libi), Nice (Libi), Amdocs, Eliyahu (Libi), Meuchedet (Libi, Flying Cargo (Libi), H&M (Libi)

❖ **Web Focus:** Jerusalem municipality IT KPIs (Malam-Team)

❖ **Microsoft:** Tabular Model – CAL (Eternity), Visionize, Conduit, Intel, Direct Insurance (Data Cube) – in memory, Opticana (Data Cube) – in memory, Dashboard – Manbas Ort (Matrix),

❖ **Qlikview:** Elbit (Qlikview Israel), Shaam (Malam-Team and Matrix BI), MaaZ (Malam-Team), Telit, Waze, Playtica, Expansions in Police and Elbit

❖ **SAS:** Dorad, Paz, Israel stock exchange, Israel Securities Authority. Expansions in Eliyahu Insurance, Social security

❖BI Consulting companies:

  ✓B-Pro

  ✓Nugami

❖All BI integrators typically also provide

  some consulting services

Big Data analytical solutions (some examples)

❖ Software AG – Terracota (Direct Insurance, Bank Leumi)

❖ EDMT on Sybase IQ

❖ IBM i2 Link analysis (Matrix – Partner) for defense market

❖ SAS high-performance analytical solutions

❖ SAP Hana (integ: Matrix, Ness, IBM, HP, ONE – XACT, VisionBI)

   ❖ Clients – IDF, IEC, Bank

❖ And more…

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MDM/ Data Hub technologies in Israel

Package	Rep in Israel	Integrators
Oracle Siebel UCM	Oracle Israel	Matrix (+BeyondIT), Yael, Taldor
SAP MDM – MDS, MDG	SAP Israel	Ness, Malam-Team HP
IBM (+acquired Initiate)	IBM Israel	IBM, Opisoft, Matrix
PIM - QAD	SIT	SIT
Tibco (CIM – product data, Telecom)	Yael	Yael
Informatica (acquired Syperian, PIM - Heiler)	Aman	Aman
Microsoft Master Data Services - SQL 2008 R2 (Stratature acquisition)	Microsoft	Matrix + other potential partners
Teradata MDM (+i2)	Mittwoch	Mittwoch
Open Source MDM: Talend		Ness-Gilon

CRM & CEM

© 2005 Ted Goff www.newslettercartoons.com

"Someone calling themselves a customer says they want something called service."

Today, 84% of customers will complain or tell others of a bad customer experience, compared to just 67% in 2006

Source: ClearAction

Bad Service. Hate it. Spread it.

❖ Don't expect clients to consider your channel constraints while performing different processes

❖ Clients expect a continuous ("omni-channel") experience that can start with one channel and continue seamlessly to the next

❖ They expect to have one true consistent identity

❖ CRM (internal) users' expectations changing as well (mobile devices, ease-of-use / better UI, social)

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"Companies that makes it easier and nicer for customers to get what they need are the companies that customers will say good things about and come back to". (ClearAction blog)

Customer Effort Score (CES)

QUESTION:

How much effort did you personally have to put forth to handle your request?

1 — Very low effort ←→ 5 — Very high effort

Focus on reducing the customer effort score

Distribution of interactions by channel

Pie chart:
- מוקד טלפוני 72%
- אתר אינטרנט 10%
- פנים אל פנים 10%
- אימייל 5%
- מובייל 1%
- מדיה חברתית 1%
- קיוסקים 1%
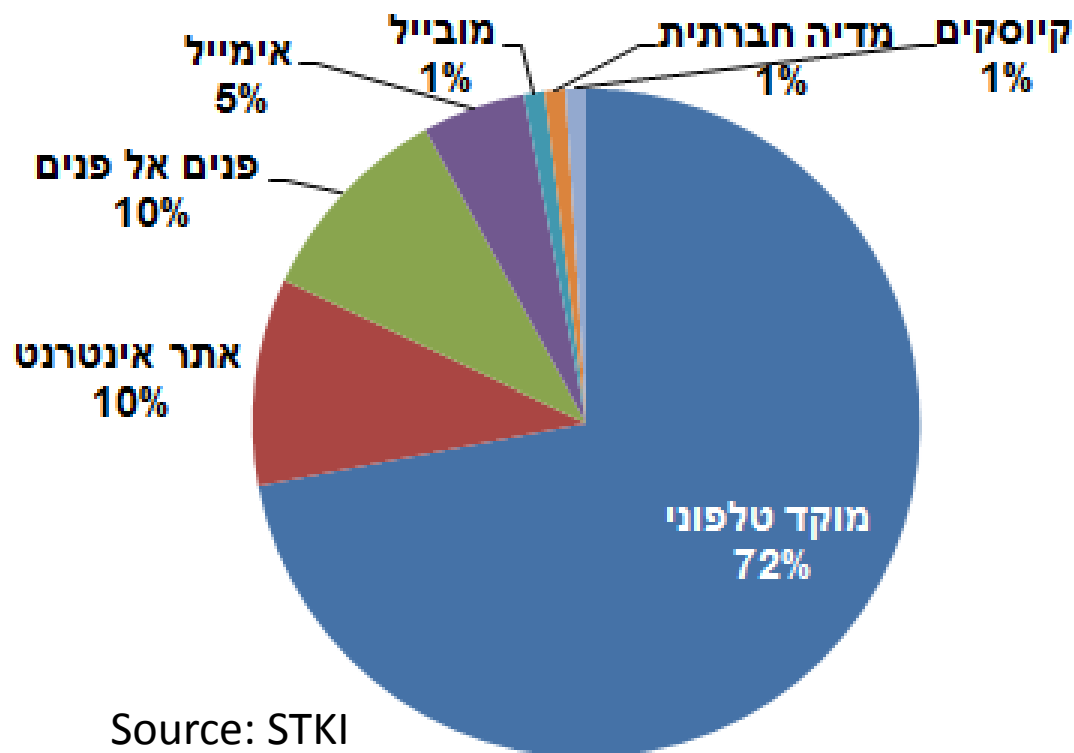
Source: STKI

Worldwide channel adoption (Aberdeen):

√ Phone: 98%

√ Email: 96%

√ Web: 90%

√ IVR: 76%

√ Mail / fax: 76%

√ Social media: 55%

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Channels by important for customer service

✓Phone (2.57)

✓Web (2.71)

✓Mobile (3.14)

Most important

✓Face-to-face (4.83)

✓Social media (5)

✓Email (5.17)

✓Kiosk/POS (5.17)

Not so important

* Importance was rated from 1-6 (1 – most important)
Source: STKI survey

Figure 1: Actionable Real-time Agent Guidance Improves Customer Satisfaction

Bar chart — Year-over-year percent change, n=487

- Companies providing real-time guidance to agents
- All Others

	Customer satisfaction	Improvement (decrease) in average handle time	Average revenue per customer contact
Companies providing real-time guidance to agents	8.8%	5.6%	4.8%
All Others	4.3%	2.7%	0.4%
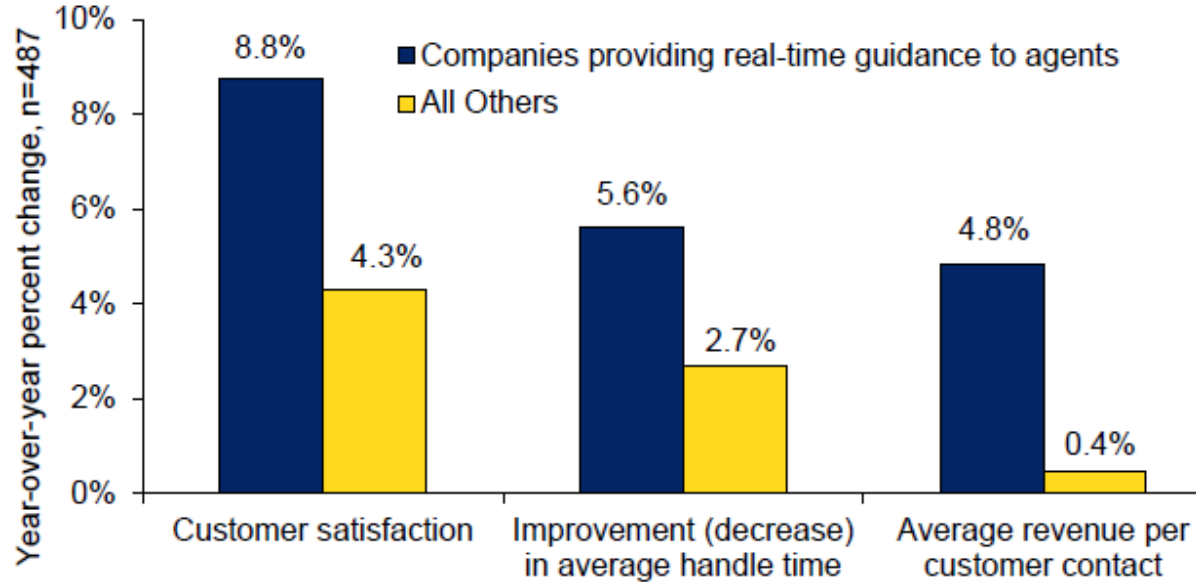
Source: Aberdeen Multi Channel contact center report 2012

Source: Aberdeen Group, August 2012

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Customer experience insight improves results

Figure 2: Empowering Agents with Multi-Channel Insights Improves Business Results

Legend:
- ■ Companies providing agents with detailed multi-channel customer data
- □ All Others

Y-axis: Year-over-year percent change, n=487

Improvement (decrease) in agent overtime costs: 8.9% / 1.8%
Improvement (decrease) in average cost per customer contact: 6.2% / 0.8%
First contact resolution rate: 6.1% / 1.4%

Source: Aberdeen Group, August 2012

Source: Aberdeen Multi Channel contact center report 2012

CIO-CMO conflict

❖ Gartner: Through 2016, 80% of marketing organizations will source 80% of their technology needs externally

❖ Conflict of cultures:

    ❖ CIO: standards, whole picture / architecture, prefers to take more time to "get it right"

    ❖ CMO: time-to-market is everything, will accept mistakes as a given

❖ In STKI WCM round table (2012) marketing people showed a clear preference to open source tools while IT people prefered MSFT/ SPS

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traditional funnel

Nonstop-Customer Experience Model

Discover
↓
Consider
↓
Evaluate
↓
Purchase

Discover

Consider

Use
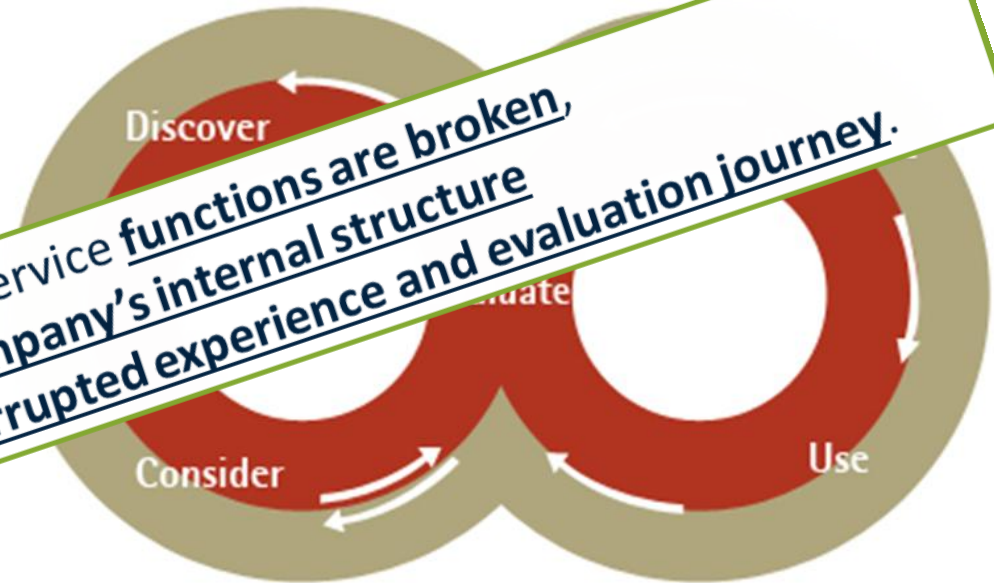
Marketing, sales and service **functions are broken**, representing a **company's internal structure** rather than the **customer's uninterrupted experience and evaluation journey**.

Open content/channels
Brand-controlled content/channels

accenture

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STKI Cynefin IT Framework

COMPLEX
probe
sense
respond
emergent practice
risk-takers <15
collaboration

unordered
learning
new meaning emerges

context
abstract language

CHAOTIC
act
sense
respond
novel practice
leaders <5
decisiveness

disordered

COMPLICATED
sense
analyze
respond
good practice
experts <150
cooperation

content
by language

SIMPLE
sense
categorize
respond
best practice
knowledge workers >150
coordination

ordered
teaching
applying what is
already known

William Proudfit, CCC 2010

Always addressable employees & customers (non-stop customer model)

Major changes: how will they affect you?

From:	To:	Result:
Understanding markets	Understanding individuals	Analytics, big data
Customer centric	Customer facing	Channels
Transactions	Relationships	
Multi channels	Omni channel	
Clients	Empowered clients	
Separate marketing, sales and services	Non-stop customer	New necessary role: Customer Experience Manager

98% using social media, 60% plan to increase but is there an ROI?

Social media marketing is mostly failing

Social Media Turnoffs %

Turnoff	%
Promotions that ask you to recruit friends to enter	69%
Being forced to 'like' pages to receive information	67%
Apps that ask for too much personal data	64%
Offensive, bad taste content	64%
People or brands that over-post	61%
Content or posts that feel like a sales pitch	54%
Repetitive content or posts	54%
Confusing activations with too many steps	50%
Content that isn't relevant to me	48%
Boring posts	40%
Too much clutter on pages	36%
Other, please specify	1%

n= 674 December 2012

Source: http://leaderswest.com/2012/12/14/people-dont-like-social-media-marketing/

Social media marketing is mostly failing

Content you find very engaging by gender

■ Female ■ Male

Photos of friends/people I know	Female 70% / Male 58%
Videos	Female 34% / Male 43%
Text Messages	Female 32% / Male 32%
Photos of things, places and products	Female 32% / Male 28%
Special offers	Female 33% / Male 27%
Promotions/ competitions	Female 31% / Male 27%
Links to articles	Female 25% / Male 26%
Links to websites	Female 19% / Male 19%
Blog posts	Female 18% / Male 19%
Online TV shows	Female 10% / Male 12%
Photos of celebrities/ famous people/ people I..	Female 8% / Male 9%
Podcasts	Female 4% / Male 9%
Online editorial coverage	Female 6% / Male 7%
Pinterest boards	Female 7% / Male 2%
Infographics	Female 3% / Male 5%
Hashtag tweets	Female 2% / Male 3%
Other, please specify	Female 1% / Male 1%

0%   20%   40%   60%

n= 674 December 2012

Source: http://leaderswest.com/2012/12/14/people-dont-like-social-media-marketing/
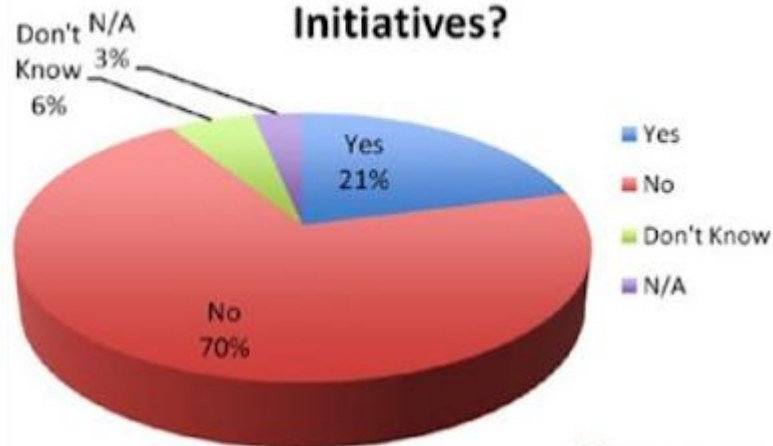
Perception of social media ROI

NEARLY HALF OF ALL COMPANIES HAVE NOT MEASURED THE ROI OF THEIR SOCIAL MEDIA CAMPAIGNS. OF THOSE THAT HAVE, ONE THIRD SAID THE CAMPAIGN PERFORMED AS EXPECTED AND 13% REPORTED THAT CAMPAIGNS EXCEEDED THEIR EXPECTATIONS. HOWEVER, SOCIAL MEDIA IS NOT YET AT THE STAGE WHERE DEMONSTRATED ROI IS REQUIRED FOR FUNDING. ONLY 29% REPORT THEY NEED TO SHOW A POSITIVE RETURN TO SECURE BUDGET.

8% 2% 13%

34% 43%
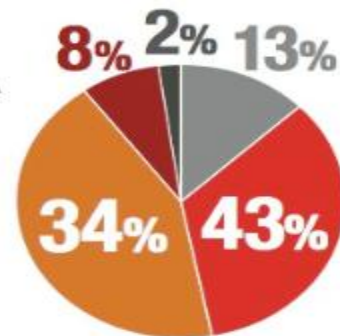
23

How do you rate the ROI of your existing whole?

43% WE HAVEN'T MEASURED IT **8%** PERFORMED WORSE THAN EXPECTED **2%** FAR BELOW EXPECTATIONS

Is Your Company Adequately Measuring its Social-Media Initiatives?

Don't N/A
Know 3%
6%

Yes 21%

No 70%

- Yes
- No
- Don't Know
- N/A

24.

campaigns be required to show a positive ROI to be funded by your organization?

E MEASURING AND TRACKING ROI **43%**

URN TO CONTINUE THE PROGRAM **29%**

'T BE TRACKING ROI AT THIS TIME **21%**

DON'T KNOW **6%**
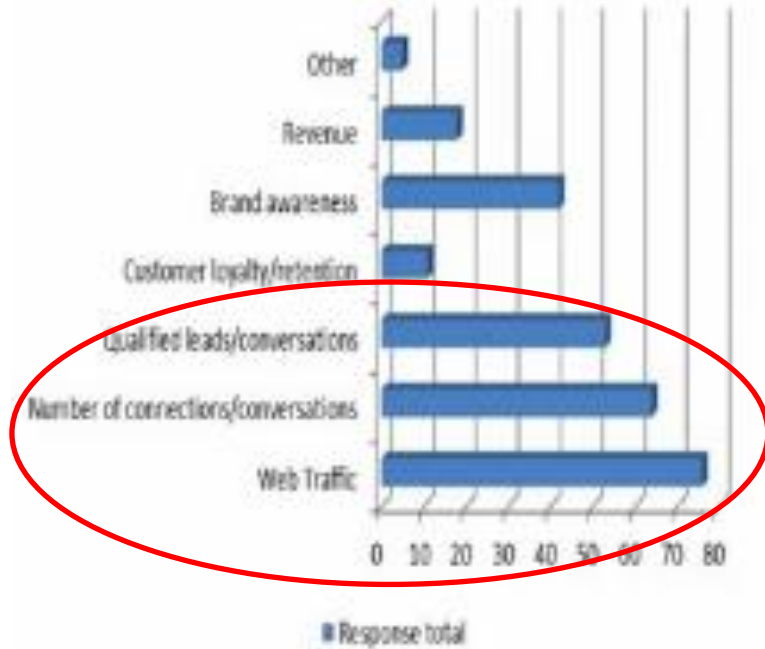
Key metrics used to measure social media ROI

Everything that can be counted does not necessarily count; everything that counts cannot necessarily be counted.

- Albert Einstein

Source: SIIA Marketing report

Social Media Regulation

Federal Financial Institution Council (FFIEC), is issuing proposed guidance titled: "Social Media: Consumer Compliance Risk Management Guidance" to address the applicability of consumer protection and compliance laws, regulations, and policies to activities conducted via social media.

Sentiment analysis for reputational risks

❖Sentiment analysis is one of the tools used to manage Reputational risks

❖Verint acquired Focalpoint (partner – HMS)

CRM Packages & Integrators in Israel (Part 1):

Package	Description	Rep in Israel	Integrators
Oracle Fusion CRM	SaaS and on-premise	Oracle Israel	ManofIT, Unitask, Taldor
Oracle – Siebel	On-premise CRM suite	Oracle Israel	Taldor, IBM, Matrix (BeyondIT), Unitask (+Exscientia), TATA-TCS, Yael
Rightnow	Service multi-channel, SaaS	Oracle Israel	
Oracle SCOD: Siebel on-Demand	On-demand	Oracle Israel	Taldor, ManofIT, Unitask (+Axcentia), Yael
Oracle e-Business CRM	CRM modules on premise	Oracle Israel	Yael, ONE1, Oracle, HP, Advantech
Oracle - Peoplesoft	CRM suite on premise	Oracle Israel	Matrix
Salesforce.com	SaaS CRM suite	Salesforce	Blat-Lapidot, Service Wise, ONE1, Cloudius, Balink
SAP CRM	CRM suite on premise / SaaS	SAP Israel	Ness, Advantech, Taldor, Explore, ValuePlus, HP, Fishman Dambo

CRM Packages & Integrators in Israel (Part 2):

Package	Description	Rep in Israel	Integrators
MEGA Center	On premise	Yael	Yael
Microsoft Dynamics CRM	on-premise, hosted, or SaaS New version ("Polaris") on and off-premise	Microsoft Israel	Partial list: Matrix, ,Elad, e4D, Advantech, Malam-Team, Aman, Prodware, SIT, Ness, One1, Webox (Cloud), YouCC…
Pivotal	On premise	One1	ONE1
Onyx (Consona)	On premise	IT Navigator	IT Navigator
Netsuite	SaaS	NetCloud	
MyBusiness	SaaS	MyBusiness	MyBusiness
Amdocs (Clarify)	On Premise	Amdocs	Amdocs
Cemax	On Premise	Cemax	Cemax
Zoho CRM	SaaS	HolisticCRM	HolisticCRM
Open Source options:	SugarCRM: www.sugarcrm.org.il Vtiger (Hebrew support): http://forge.vtiger.com/projects/vtgheb		

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CEM and multi-channel in Israel – part 1

Package	Description	Rep in Israel
Oracle - Rightnow	Multi-channel service, SaaS	Oracle Israel
Oracle - Inquira	Multi-channel knowledge management	Oracle Israel, Ergo - partner
Vitrue	Social media "sniffer" and publisher	Oracle Israel
Involver	Building social media apps	Oracle Israel
Salesforce Chatter	Social media	Salesforce
Salesforce Ideas	Customer Innovation platform	Salesforce
MCx	Multi Channel Platform	Matrix
Loyalty Lab (Tibco)	Loyalty management, SaaS	Yael Software

CEM and multi-channel in Israel – Part 2

Package	Description	Rep in Israel
Fanzila	Social CRM	Ness
Gigya	Social CRM	Ness
Odysii	Branch/ Point of Sale empowerment	Odysii, Taldor - partner
Kana	Multi-channel service	Omnitech (SRL)
Moxie Software	Multi-channel service	Business Solutions
Attentive ACE (Ransys)	Customer Feedback management	Ransys, Advantech
Cexpert	Chat-center management	YouCC
Walkme	Customer online guidance (EPSS) for web	JohnBrybe

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Contact Center Knowledge Management

Package	Description	Rep in Israel
KMS - Lighthouse	Knowledgebase for service agents and web self service	Aman
Oracle - Inquira	Multi-channel knowledge management	Oracle Israel
Kana	Multi-channel service	Omnitech (SRL)
Moxie Software	Multi-channel service	Business Solutions
Braini	Knowledgebase for service agents (SPS based)	Matrix
Elad	Knowledgebase for service agents (SPS based)	Elad
Contact 360 - Advantech	Contact center solution, includes training, KM, optimization	Advantech
Cexpert	Knowledgebase for contact center	YouCC

Most enterprises have focused only on service agents KM
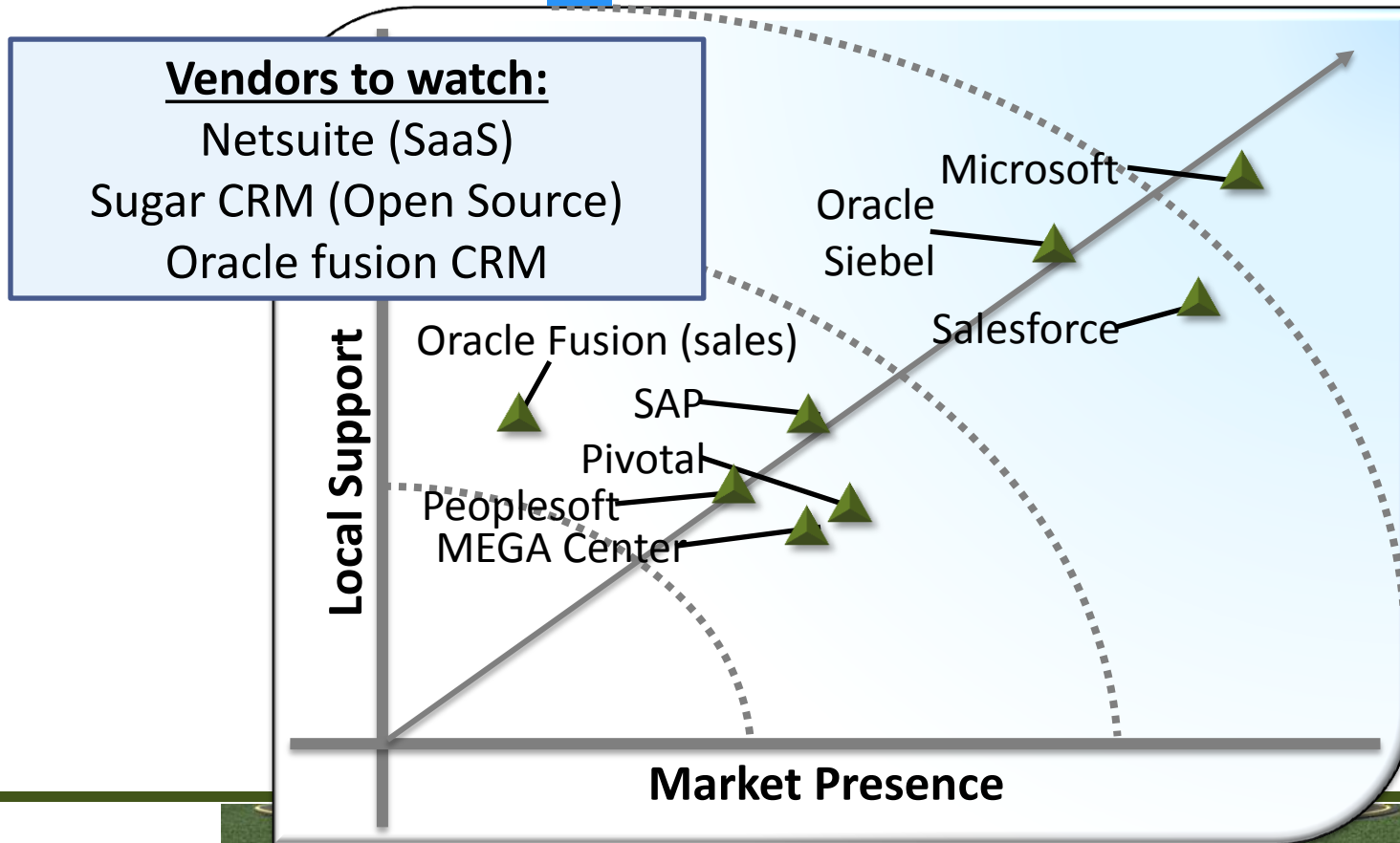## Next focus will be cross channel KM

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Marketing management platforms in Israel

Package	Description	Rep in Israel
NEW Microsoft Marketing Pilot	Marketing platform	Microsoft Israel
NEW Oracle - Eloqua	Cloud based marketing automation	Oracle Israel
NEW Salesforce Marketing Cloud	Social marketing cloud	Salesforce
NEW iDocs	Marketing automation - communication	Ness
Unica	Marketing Suite	IBM, Gstat
SAS	Marketing Suite	Mia computers
Marketo	Marketing platform	ServiceWise
Teradata - Aprimo	Marketing platform	I.E. Mittwoch

Many new players added in 2012, CRM players now offering more advanced modules

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Operational CRM - Israeli Market Positioning 2013

Vendors to watch:
Netsuite (SaaS)
Sugar CRM (Open Source)
Oracle fusion CRM

Microsoft

Oracle
Siebel

Salesforce

Oracle Fusion (sales)

SAP

Pivotal

Peoplesoft

MEGA Center

Local Support

Market Presence

This analysis should be used with its supporting documents

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CRM Selected wins – 2012 (Partial list)

❖ **Oracle:**

    ❖ Oracle Fusion (SFA): Galam

    ❖ Oracle Siebel – expansions: Bank Poalim (Business unit), Ituran (Matrix), Partner project+ upgrade to 8.1, a few Siebel on demand, Teva – ww projects (Matrix)

❖ **Salesforce:**

    ❖ Salesforce – CRM: Keren Le'Yedidut, Comverse (sales), Harmonie (sales), Exlibris (service, sales), Objet (sales), IDI Ventures, Alvarion (sales), Algosec (support), Manpower (sales), Most technologies (sales), Orad (support), Payoneer (sales), Perfecto Mobile (sales, support, marketing), Solar Edge (support), IEC business development (sales), San Patrolium (One1), Avney Rocha (One1), Ultra-Shay, Lochamey Hagetaot Museum, Netformix (One1), Nefesh Be'Nefesh (One1), RPM Global (One1), Goren Financial soluions (One1)

    ❖ PaaS (Force): Keren Le'Yedidut, Tel Aviv univ, Delek – Europe, M. of Health, Zim

❖ **SAP:** Gilat - service (Advantech), IEC – collections, Military Praklitut, Nilit – sales (Ness), Machon Hatkanim (Ness), Navy – XRM, Yafora – moked (Ness), Technion – donors (Ness), Tempo – telesales (Ness)

❖ **Pivotal:** H.Y Elecronics (service, sales, KM, scheduling), Orgal (Service), Upgrades – Systematics, Tamir Fishman

❖ Microsoft: Apfa-Platinium (Advantech), Amidar (Advantech), AMIT (Advantech), ATHENA (Advantech), Auto Center (Advantech), Barziliadesign (Advantech), BetaMedia (Advantech), Goren Amir (Advantech), Hashava (Advantech), Hertz (Advantech), Lavietimetech (Advantech), Lubinslki (Advantech), OR City (Advantech), Osem (Advantech), Push (Advantech), RAD (Advantech), Shestowitz (Advantech), Shikum & Binui (Advantech), Varonis (Advantech), Yad Vashem (Advantech), Hitachdut Taasyanim - XRM (Malam-Team), El Al – XRM (Malam-Team), Mevaker Hamedina – Pniot Zibur (Malam-Team), Masa – XRM (Malam-Team), Jewish Agency (Malam-Team), Rappaport – sales (Malam Team), Beit El Industries – XRM (Malam-Team), Dexia – XRM (Malam-Team), Ichilov (Malam-Team), Tmura (Ness), Mislaka Pensionit (Ness), Pelephone mail center (Matrix), Danel (Matrix), Unilever (Matrix), Newpan (Matrix), Dealserver (Matrix), Gav (Matrix), Even Keisar (Matrix), Ayalon Group (Matrix), Yes (Elad), Assuta (Elad), Sheba (Elad), Super Pharm (Elad), Ashdod Port (Elad), Cellbrite (Elad), M. of Health projects (Matrix, Elad, Malam-Team, Prodware, e4d), Maccabi Pharm (Elad), Prime Minister Office (Prodware), Ikea (Prodware), Shaam (Prodware), NETA (Prodware), Teva (Prodware), Ministry of housing and construction (Prodware), ADI (Prodware), Lubinsky (Prodware), Mobileye (Prodware), Ministry of immigrant absorption (Prodware)

> ❖ Cloud (Live): Multilock (Advantech), Kfar Saba Municipality (Malam-Team), Zevet - IDF veterans association (Elad), Energy authority (Elad), Knowledge4all (Prodware)

> ❖ Upgrades: Bank Igud (Matrix), Migdal (Matrix), Meitav (Matrix), Prime Liss (Advantech), Bat Yam Municipality (Advantech), Red C (Advantech), M. of Justice (Elad)

❖ Salesforce – Radian6 (Listening platform): Verint, Better Place, IDF

❖ MCx – Bank Jerusalem (Matrix), Bank Igud (Matrix)

❖Elad

Got recommendations for implementing Microsoft CRM/XRM

CRM Consultants in Israel - Partial List

- **Accenture**
- **Alternative**
- **B-Pro**
- **Deloitte Touche**
- **IT solutions:** CRM & Billing
- **Lior Luria:** Contact centers
- **Matrix (Beyond IT)**
- **Meteor**
- **Ness-Gilon (Synergy)**: Loyalty, Customer Analytics & Social CRM
- **Nugami**

- **Sensecom**: Contact Centers
- **Widelink**
- **Value Plus**
- **Several independent advisors**

(Alphabetical order, not a ranking!)

Content,
Collaboration,
Social enterprise

Knowledge management

❖ Enterprise App Store as the next delivery/portal method

❖ Enterprise social networks are much more common but Social ROI and benefits are not yet identified (hard to find "enterprise social network" consultants)

❖ Employees expect to work seamlessly across all devices

  ❖ File synchronization tools is on the rise

THEN…

Print Copies / Storage Cabinets / Color Tabs

KPCB

NOW…

(Dropbox / Box.net / Google Drive / Apple iCloud
/ Microsoft SkyDrive / Amazon Cloud Drive)
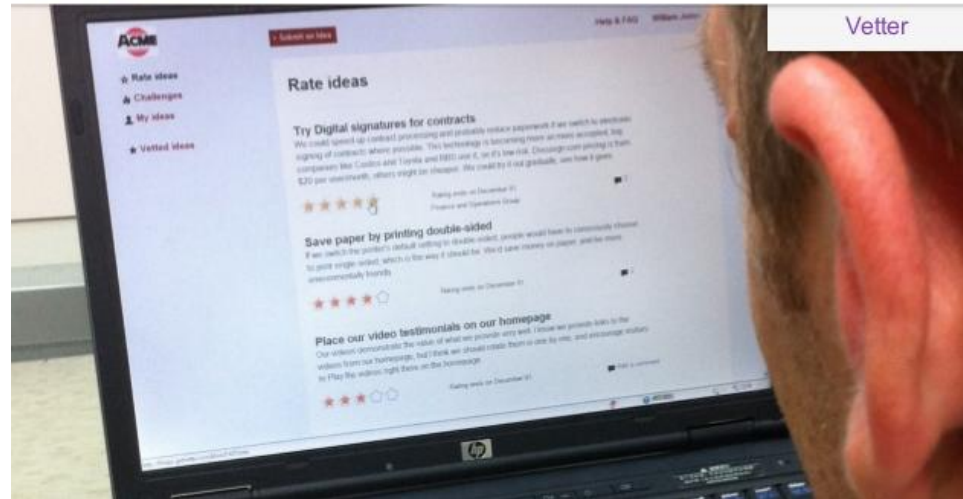Always Synced / Always Accessible / Multi-Device
Searchable Digital Files

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❖During 2013 STKI got <u>only 1 question</u> about tools that support innovation (idea management) in the organization

Real-Time Suggestion Box Connects Managers With Employee Ideas

Portals & Social Networks : Players in Israel

Company	Product name	Integrators
Microsoft	SharePoint portal server	Advantech, Top Soft, Eternity, Bynet, Malam-Team (Guardian), Ewave, Matrix, Tvuna milenium (SQlink), ELAD, HP, Byon, One1, Yael, Consist, Aman, Methoda, PZ Projects, YouCC…
IBM	Websphere Portal	IBM, One1, Matrix, Risotech-Elad, Malam-Team, Advantech, Midlink, C-soft, Web Tech
SAP	SAP Portal	Ness, Taldor, Malam-Team, One1, Advantech, HP, IBM, Skywind
Oracle	Oracle Portal, Web Center	Matrix, Ewave, Taldor, Advantech, Unitask, Malam-Team, Oracle Consulting
Open source	Liferay	Matrix, Malam- Team

Enterprise 2.0 Social Tools (Partial List)

Product	Category	Israeli rep.	Integration partners
IBM connections, Quicker	Social networks, Team rooms, wikis, blogs	IBM Israel	Elad-Risotech, WebTech Innovation & other IBM WS partners
Microsoft – SharePoint 2013 + Yammer	Social networks, Team rooms, wikis, blogs	Microsoft Israel	E4d, Ewave, Kwizcom, Byon, Bynet SW, Matrix, Top-Soft & other MOSS partners
Kwizcom Web 2.0 bundle (ShaerePoint addons)	Wiki, Tagging, rating, forum	Kwizcom	
Atlassian	Wiki	Elad	
Tibbr	Enterprise social networking	Tibco	Yael

Enterprise 2.0 Social Tools (Partial List)

Product	Category	Israeli rep.	Integration partners
Chatter(salesforce)	Cloud collaboration	Salesforce	One1, Blat Lapidot, ServiceWise
Oracle (Beehive)	Collaboration	Oracle	
Harmon.ie	Social Email	Yael	Bynet, Kwizcom
NewsGator	Social Sites	Top Soft	
QUAD	Collaboration platform	CISCO	
Mediawiki (open source)	Wiki		Byon, Matrix
Jive	Social networks		
Asana	Work application		
Elgg (open source)	Social network tool		
Idea management	Innovation	Advantech development on SPS	

Enterprise Portals & social networks - 2013

Local Support

Market Presence

Microsoft

SAP

IBM

Oracle

This analysis should be used with its supporting documents

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Einat Shimoni's work
Copyright@2013
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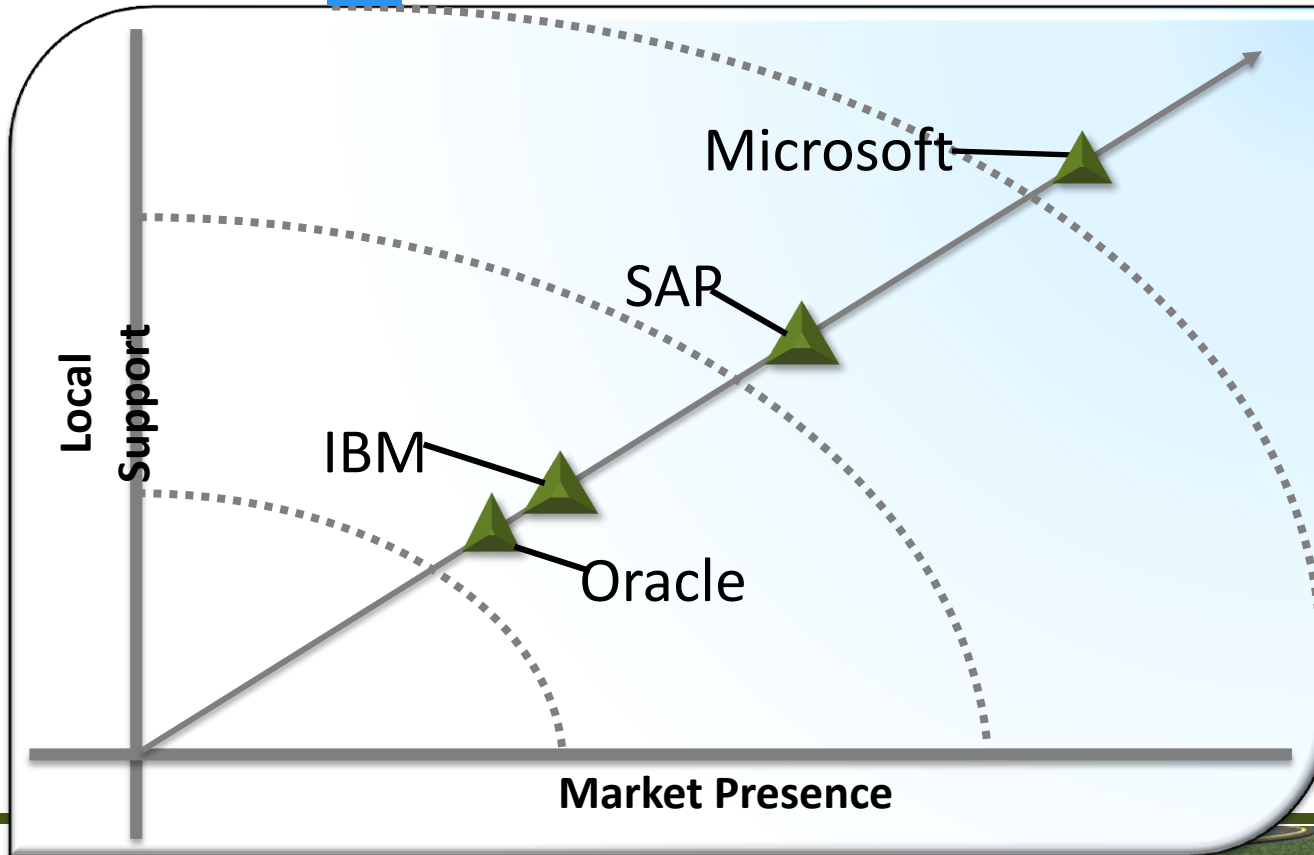
Enterprise Portals – selected wins 2012 (partial list)

❖**SPS**: Rashut Teva Veganim (Malam-Team), Bait BaLev (Malam-Team), Neviot (Malam-Team), Weisman Institute (Malam-Team), Taglit (Malam-Team), Election committee (Ness), Bank Leumi (Ness), Netafim – cloud (Matrix), Assuta – CC Knowledgebase (Elad), Gertner Institue (Elad), Keren Hayesod (Elad), Rishon Letzyion municipality (Elad), Galam (Bynet), M. of Justice – Metalogix (Bynet)

 ❖**SPS 2013 upgrades**: Jaja (Advantech), Exlibris enterprise portal (Malam-Team), Conduit (Eternity), NETA (Bynet)

❖**SAP PORTAL**: Technion, Haifa University (Advantech), Bank Israel – ESS MSS (Ness – design UI)

❖Salesforce chatter: Osem (Nestle), Unilever, Nice, Audiocodes,

❖Harmon.ie: Bank Poalim, Clalit Health Services, FBC, Machon Mor, Dead Sea Works

WCM Trends

❖ Open Source: Wordpress most popular – 17% (most simple), Joomla - ~3%, Drupal (cost complex) - ~2% of all sites (source: W3Techs)

❖ Community based: Drupal, Joomla

❖ Commercial: Alfresco, Drupal, Dot Net Nuke, eZ systems

❖ By 2015 25% of organizations will have named a chief digital officer. (Gartner)

❖ Responsive Design is becoming a MUST

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RDW (Responsive Web Design)

❖ W3C - CSS3 media queries specification (inspects physical characteristics of the device rendering the site)

❖ Implications:
  ❖ Designers need to design upfront with RDW in mind
  ❖ Closer link between design and programming

❖ http://www.mobilespear.co.il/ (Realcommerce) adds RDW to existing sites for mobile device adaptation

❖ First definition of RDW:
  http://alistapart.com/article/responsive-web-design

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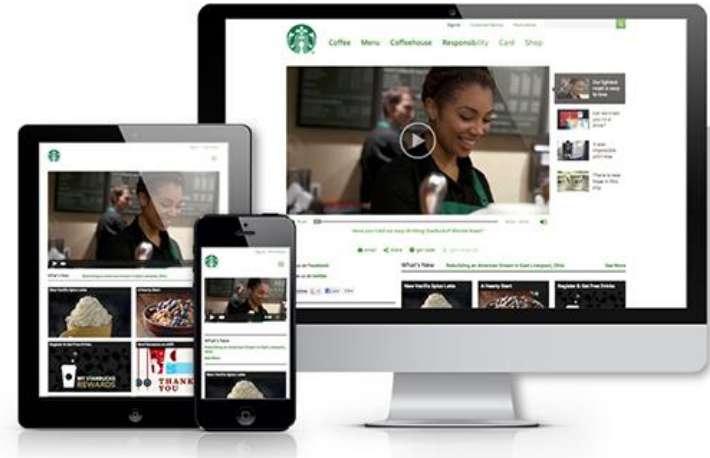
Web content management tools: Players in Israel – Part 1

Company	Product Name	Integrators
Microsoft	MOSS	Ewave,Matrix, Malam-Team, Advatnech, Elad, Bynet SW, HP, Consist, Yael, Tvuna Milenium (SQlink), One1, Byon, Aman, Realcommerce, Ness & more…
IBM	Websphere Portal	Matrix, Risotech-Elad, IBM, ONE1, SPL-Idor, KITS-advantech, Midlink, C-soft, Taldor, Web Tech
Bynet	Sitecore	Bynet
Bynet	EZ Content	Bynet
Matrix Digital	Acx (Scepia)	Matrix Digital
Matrix Digital	EPIserver	Matrix
Matrix Digital	Telerik (Sitefinity – product)	Matrix
Realcommerce	RealCMS	Realcommerce
Consist	CMS (PHP)	Consist

Company	Product Name	Integrators
Ewave	eGenCMS 2.0	Ewave
Interwoven (Autonomy – HP)	Xioma	Xioma
Oracle Israel	Oracle Web Center	Matrix, Ewave, Coral, Taldor, Advantech, Unitask, Malam-Team - Stellent, Qesem, ONE1, Mckit, HP
	Oracle ATG	Oracle, Cognity, Ewave
SAP Israel	SAP Portal	IBM, One1(Xact), Ness, HP, Taldor, Malam-Team, etc.
Salesforce	Site.com	Blat-Lapidot

WCM Open Source

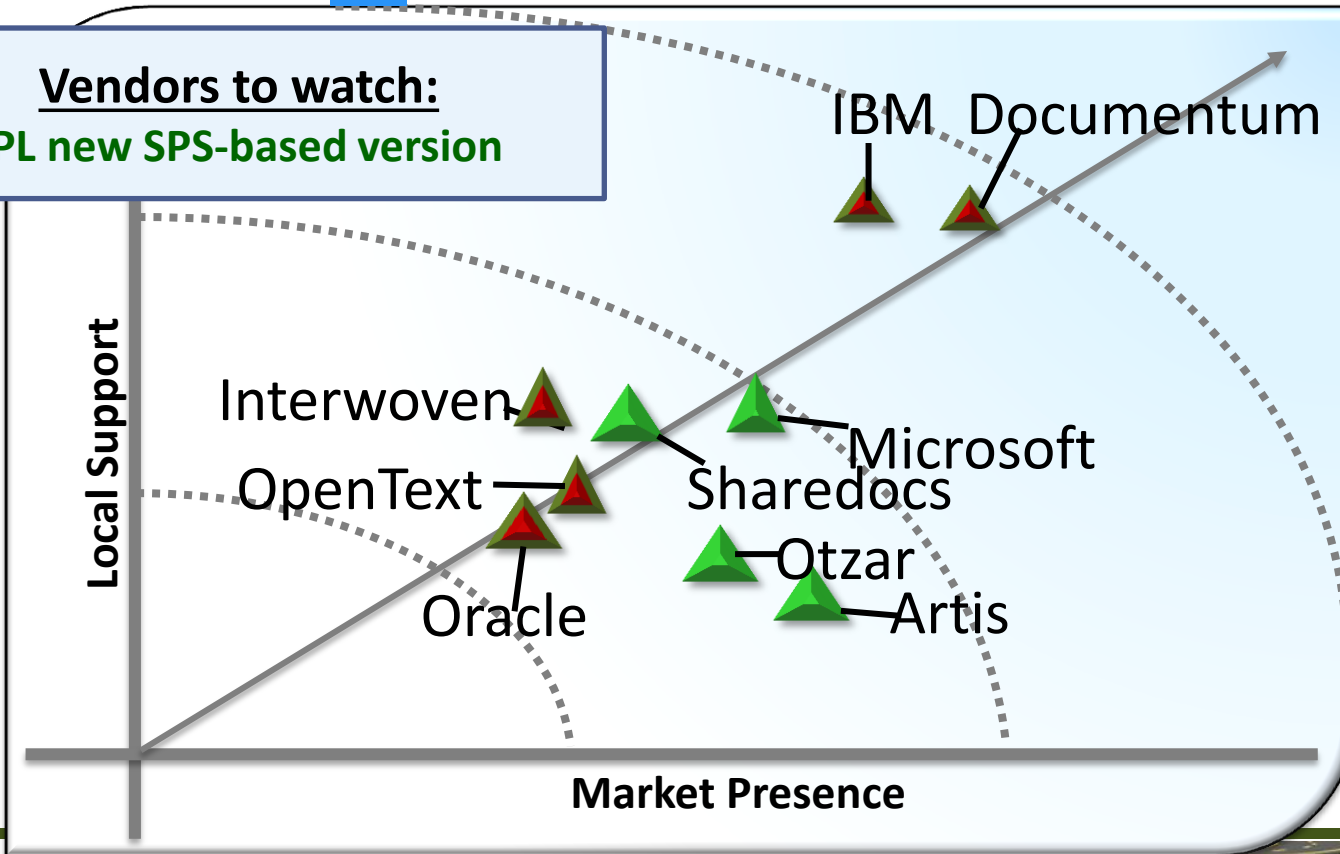| Product Name	Israeli specialists (partial list):
Joomla	Consist
Drupal	Realcommerce, Ewave, Consist
Wordpress	Ewave
Dot Net Nuke	Malam-Team
Consist	PHP-based CMS product
Cuyahoga (Open Source on Microsoft platform)	Aman
Umbraco	Matrix
Liferay	Malam-Team, Matrix
Nopcommerce (open source e-commerce, shopping cart)	Matrix

Internal ECM players in Israel

Product	Israeli rep.	Integrators
EMC-Documentum	EMC, Ness	Ness, Iixa
IBM- Filenet	IBM Israel	Yael- IFN, Elad, Integrity Software
Open Text	Omnitech (SRL), SAP	Malam- Team, Advantech
Interwoven – HP Autonomy	HP, Xioma	Xioma
SharePoint	Microsoft	Many ISVs..
Software Innovations (360°) – 3rd party tool for SPS	Top Group	
Oracle	Oracle Israel	Integrity Software, Malam-Team
Sharedocs	Elad	Elad
Otzar	Aman	Otzar, Aman
Ada system	Artis	Artis, Taldor, Malam-Team
MPL (+SPS based version)	MPL	MPL
D2K	Matrix	Matrix

ECM - Israeli Market Positioning Q1 2013

Vendors to watch:
🔺 **MPL new SPS-based version**

IBM Documentum

Interwoven

OpenText

Microsoft

Sharedocs

Oracle

Otzar

Artis

Local Support

Market Presence

🔺 **High-End Player**
🔺 **Mid-tier Player**

This analysis should be used with its supporting documents

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❖**Documentum:** Cont. of SAAR projects (Ness + Matrix), Social security, SHAAM, Hot mobile, M. of Foreign Affairs, M. of religious services, Israel state archive, Machon Hatkanim

❖**Otzar:** Samelet, Hertz, Regba – suppliers documents archiving,

❖**Interwoven (HP):** Legal sector or legal department: Weisman Institute, Plasson, Bezeq

❖**Sharedocs:** Zevet, Bank Jerusalem, Hevra Kadisha, Rishon Letzyion municipality (Elad)
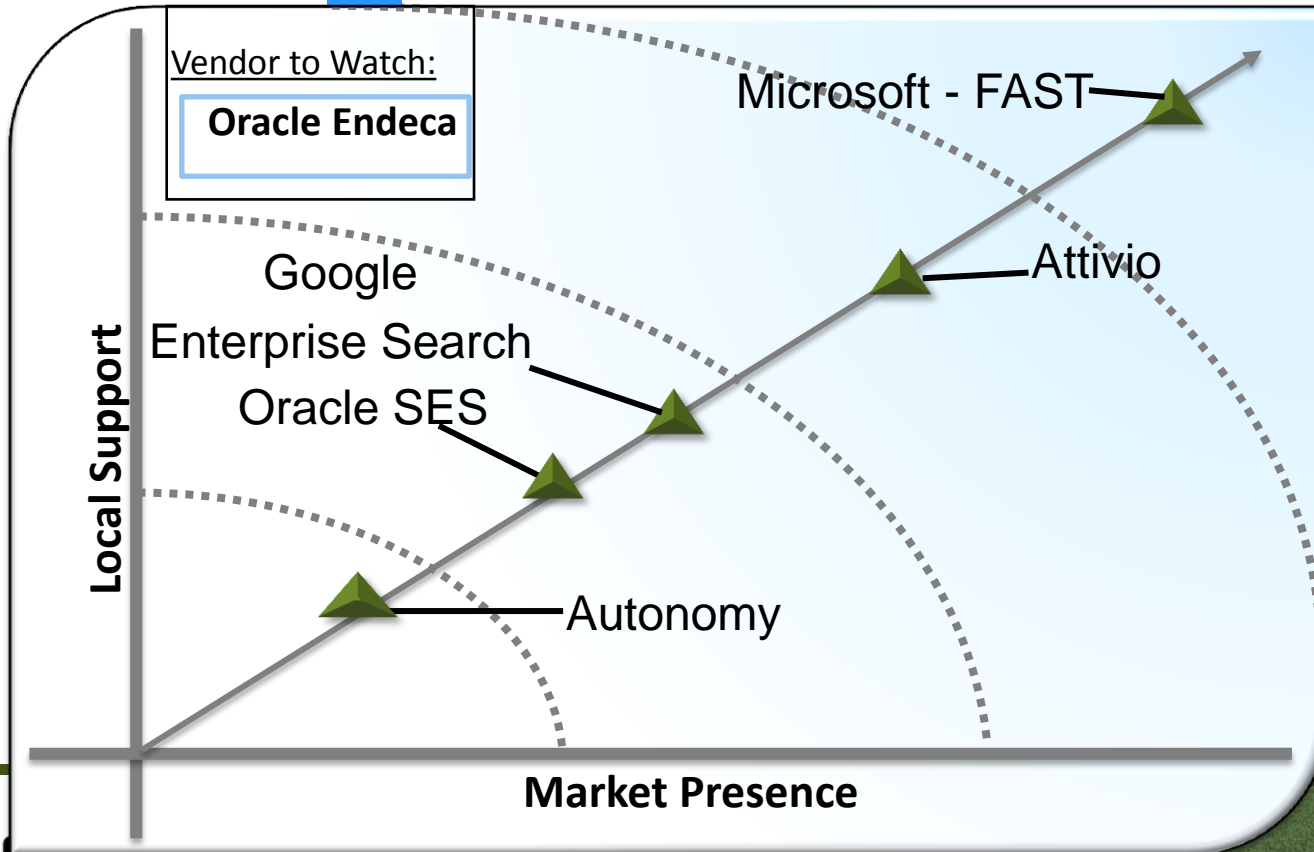
❖upgrades – IEC, M. of Health

Enterprise Search and Retrieval players in Israel

Product	Rep/company in Israel	Other imple./ partners
Autonomy	HP	Xioma, Matrix, Elbit, Taldor
Microsoft- FAST	Microsoft	Many ISVs – One1, Matrix…
Google Enterprise Search	Taldor, Yael	Taldor, Yael
Search Lite	Matrix	
Attivio	Matrix	Matrix, Yael, Ness
OmniFind enterprise search	IBM	
Oracle SES	Oracle Israel	Veracity
Endeca (New)	Oracle	
Solr – open source search based on Lucene (Lucene – open source search engine) + HebMorph (Hebrew morphology addon)		
XRS	2001	
*** Melingo-Morphology	Melingo (Matrix)	
*** Babylon- Information Retrieval	One1	

***-Complementary Enterprise Search products

from any slide, graph or portion of graph

Vendor to Watch:

Oracle Endeca

Microsoft - FAST

Google
Enterprise Search

Oracle SES

Attivio

Local Support

Autonomy

This analysis should be used with its supporting documents

Market Presence

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- Byon
- Digidoc- Document Management
- Ergo (Ido Namir)
- Gait- Document management
- Itai stern
- IT Solutions
- Know-edge (Yair Dambinsky)
- Matrix
- Methoda
- Yael
- Business Solutions

(Alphabetical order, not a ranking!)

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Organizations still describe many challenges to BPM

- Technological and maturity issues in BPM packages (especially large BPM suites) – leads to many developments and delays

- Soft "political" issues (who wants "transparent processes", anyway?)

- High learning curve for developers/analysts
  - 2-3 months for developers to learn (the more experienced, the more it will take)

- High start-up costs and long time (around 1-1.5 years to "enter the BPM world" and setup the right infrastructure

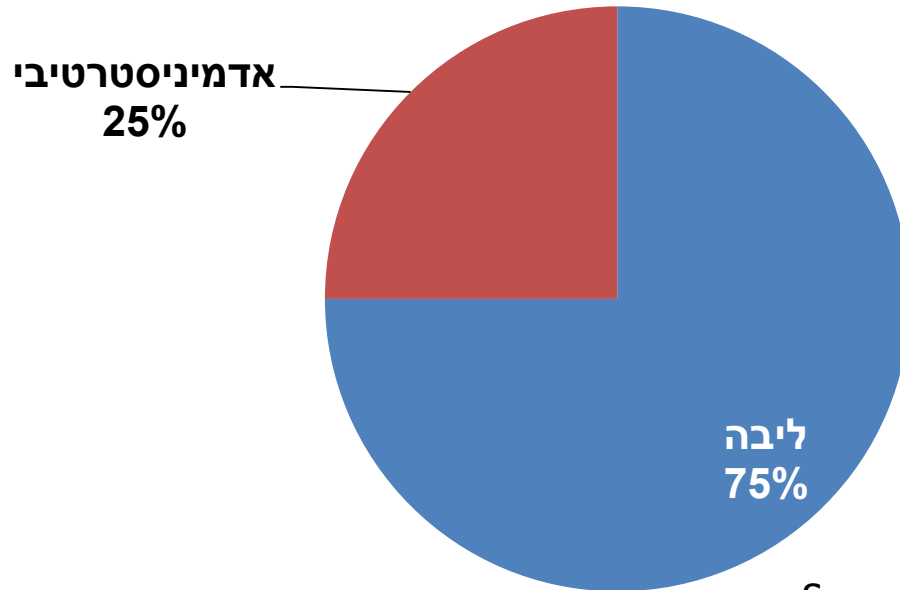**For tips and recommendations "from the field", read our BPM Round Table summary**

- Once infrastructure is in place, it will take ~50% of the time to <u>develop a new process</u>
- Agility - Flexibility in changing existing processes
- Visibility – transparency of processes

האם BPM מתאים לתהליכי ליבה או אדמיניסטרטיביים?

אדמיניסטרטיבי
25%

ליבה
75%

Source: STKI survey

Human-oriented BPM Players in Israel – Part 1:

Package	Modeling	Execution	BAM	Israeli Rep	Integration Partners
Oracle BPM	X	X	X	Oracle Israel	Ewave, ONE, Advantech, Matrix
IBM (Filenet, Process Server, Lombardi)	X	X	X	IBM Israel	IBM, Opisoft, Risotech-Elad, One1, Matrix, Midlink, Yael-IFN, Ness TSG, Tangram, Advantech
Tibco BPM	X	X	X	Yael	Yael
Sequence (PNM)	X	X	X	PNMsoft	Matrix, PNMsoft
K2		X		Malam-Team	
BizDoc (WF)		X		Moding	
Skelta	X	X	X	One1	One1

Human-oriented BPM Players in Israel – Part 2:

Package	Modeling	Execution	BAM	Israeli Rep	Other Integration Partners
AgilePoint	X	X	X	Omnitech (SRL)	Malam-Team, HP
Software AG BPM (includes Aris)	X	X	X	SPL Software	Seker, HMS
Ultimus	X	X	X	Tiuv	
Nintex (WF/ BPM-light)		X		Bynet SW	Bynet SW
SAP BPM	X	X	X	SAP Israel	SAP Integrators
EMC (Documentum + Proactivity BPA/BAM)	X	X	X	EMC, Ness	
CaseWize	X		X	HMS	
JBPM (Jboss)		X	X	Matrix	
ProcessGene	X			ProcessGene	

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Human oriented BPM - 2013

New players to watch:
▲ **Skelta**

Local Support

Market Presence

IBM

Oracle

Software AG
Agilepoint

Nintex

JBOSS

Tibco

PNM
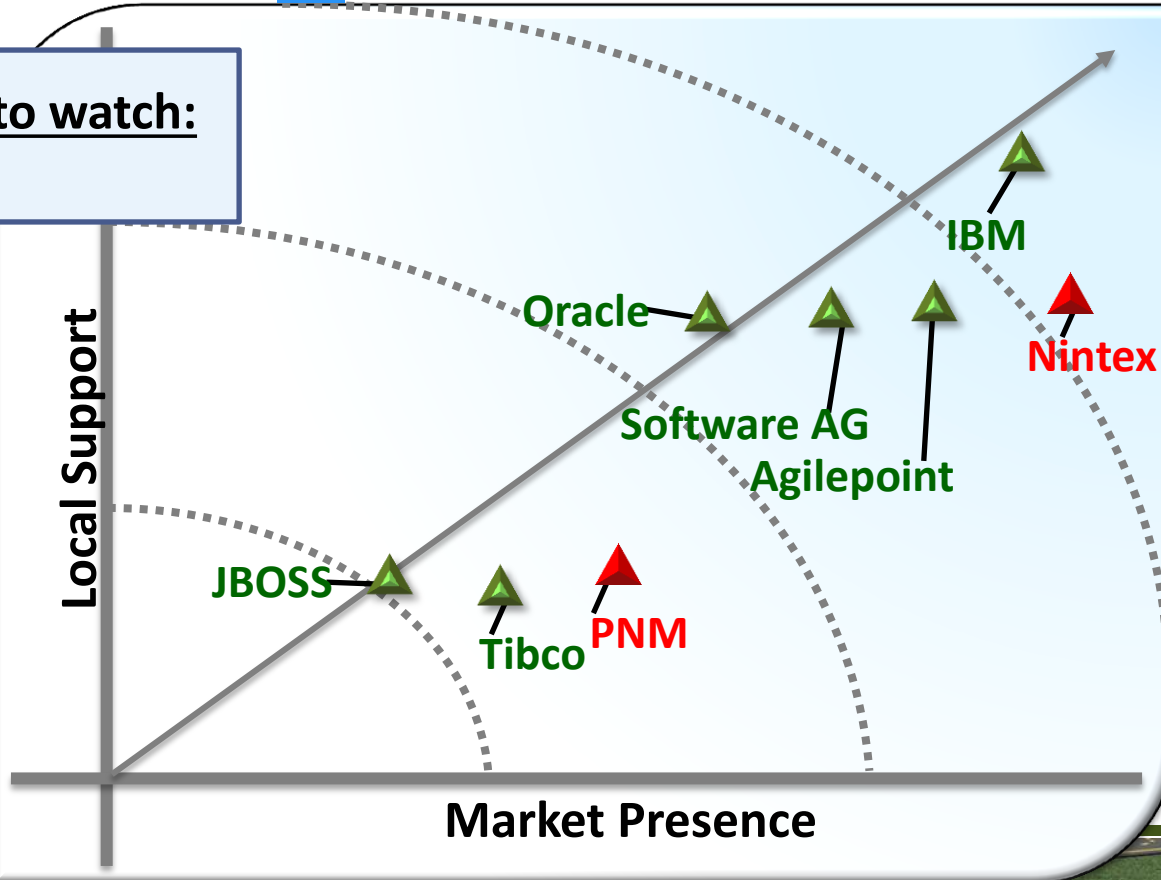
▲ **BPM suite**

▲ **Workflow/
BPM-light**

*This analysis
should be used
with its
supporting
documents*

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•Agilepoint: ECI – products and HR, Bank Leumi (specific project), Comverse – HR process

• Software AG Aris: Teva – SAP ERP process modeling, Bank Poalim – EA expansion, Partner – Siebel, Tnuva – ERP, Ceragon, Maccabi expansion, Amdocs

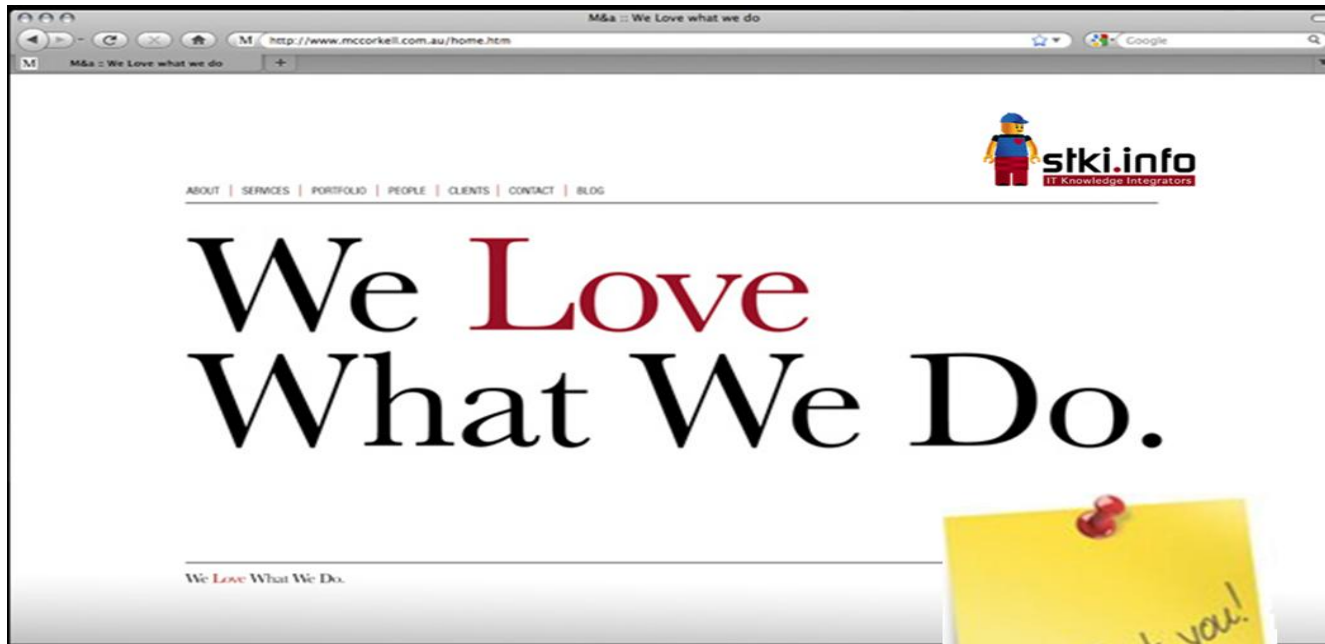• Skelta – Kakal, Elbit BP modeling

• JBOSS BPM – Better Place

Small & successful projects (recommended by clients):

❖Nintex – lightweight-BPM/Workflow in SPS environment

❖Babylon enterprise – recommending clients used it for fast access to data that resides in enterprise systems (ERP, CRM)

❖Chatter – social enterprise tool

❖Harmon.ie – integrating outlook into Sharepoint

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