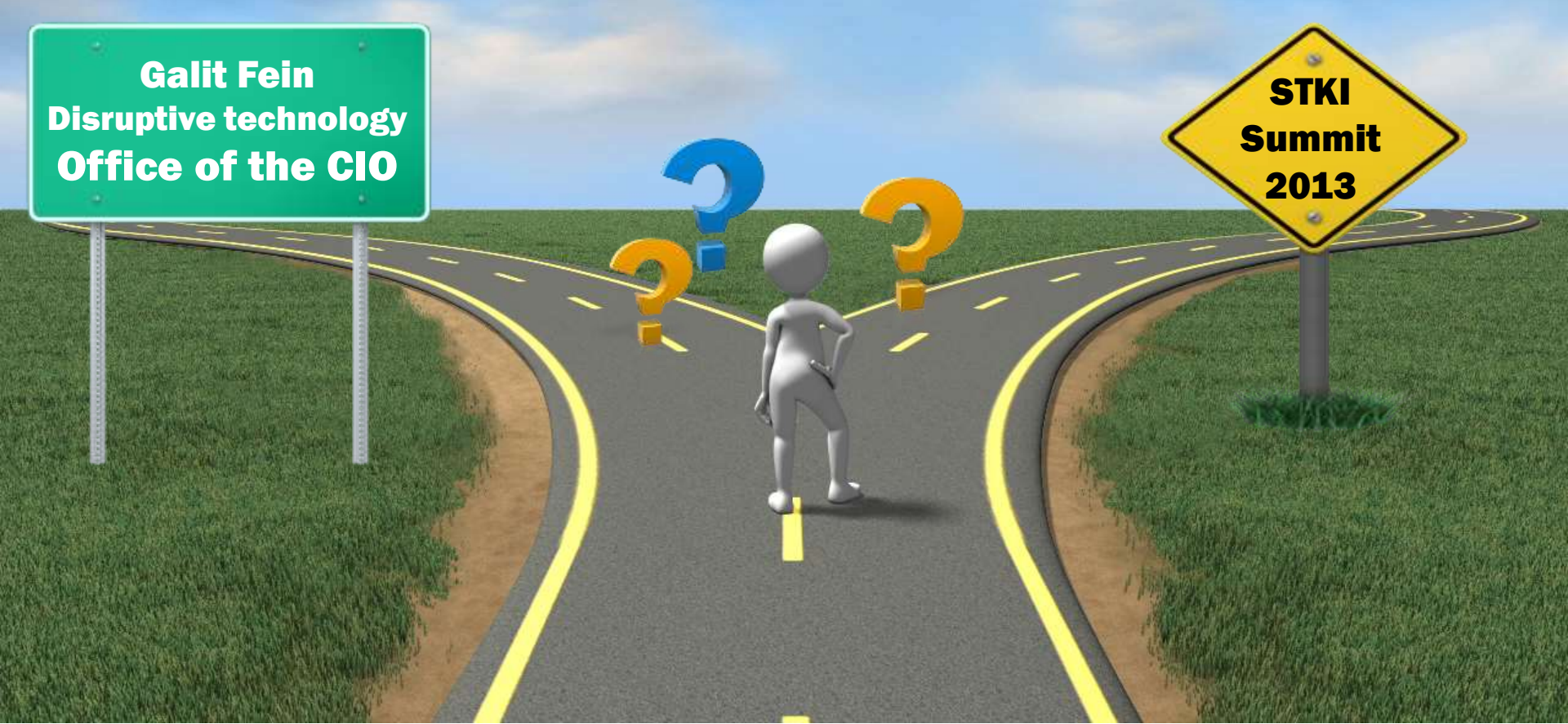


**Galit Fein**  
**Disruptive technology**  
**Office of the CIO**

**STKI**  
**Summit**  
**2013**



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

# Agenda

## Disruptive IT Paradigms



## Social, mobile, cloud trends



## Changes in IT



## Office of the CIO Trends



## Sourcing Trends



# The World Has Changed



# RE-Imagination of EVERYTHING

## Re-Imagination of Computing Devices...

## Re-Imagination of User Interfaces...

## Re-Imagination of Connectivity...

**THEN...**  
(Desktops / Notebooks)



**NOW...**  
(Tablets / Smartphones)



**THEN...**  
(Keyboard + Mice =  
Graphical User Interface)



**NOW...**  
(Touch + Voice + Gesture =  
Natural User Interface)



**THEN...**



**NOW...**



## Re-Imagination of Knowledge...

## Re-Imagination of Photography...

## Re-Imagination of Navigation + Live Traffic Info...

**THEN...**  
(Print Copies / Updated  
Annually)



**NOW...**  
(Accessible Everywhere / Updated  
Real-Time / Everyone Can  
Contribute)



**THEN...**

Dedicated Camera / Manually  
Transfer Digital Files / Develop Films



**NOW...**

(Instagr.am / Camera+ / Hipstamatic...)  
Always With You Camera (Smartphone) /  
Instant Digital Effects / Share / Sync / Discover



**THEN...**

Physical Copies of Map in Car /  
TV, Radio Reporting of Traffic Info



**NOW...**

(Waze)  
User-Generated Digital Map /  
Live Crowd-Sourced Traffic Data



# RE-Imagination of EVERYTHING 2

## Re-Imagination of Note Taking...

THEN...

Pencil + Notepad



NOW...

(Evernote)

Always Synced / Multi-Device /  
Picture + Audio Enabled / Searchable



## Re-Imagination of Signatures...

THEN...

Scan / Fax / Mail to Return  
Signature Page



NOW...

(DocuSign)

Electronic Documents / Secure Audit  
Trail / Instant E-Signature



## Re-Imagination of Content Organization / Aspiration...

THEN...

Paper / Scissors / Glue



NOW...

(Pinterest)

One-Click to Pin / Share /  
Follow / Always Accessible



## Re-Imagination of News + Information Flow...

THEN...

Delayed / Dedicated Reporters + Cameras /  
Regional or National Reach



NOW...

(Twitter)

Real-Time / Citizen Reporting via  
Mobile Devices / Global Reach



## Re-Imagination of Data – Help Me, Help You, Help Others...

Waze

- 30MM Users, +3x YY
- 600MM+ Miles Driven per Month with Waze Open



Jawbone UP

- Initial Launch of ~70K Users (11/11) =
  - 7B+ Steps
  - 800 Years of Sleep
- Re-launched 11/12



Yelp

- 84MM Users, +37% YY
- 33MM User-Generated Reviews, +49% YY



## Re-Imagination of Always On...

Bluetooth

-2B Bluetooth-Enabled Devices Shipped Globally in 2012E, Up 87x in 10 Years



Wi-Fi

-1.5B Wi-Fi Enabled Devices Shipped Globally in 2012E, Up 5x in 4 Years



Personal Server in Your Pocket + Sensors / Signals Uber Alles

How Many of You are Wearing a "Wearable" Now?

How Many of You will be Wearing a "Wearable" in 5 Years?

# RE-Imagination of EVERYTHING 3

## Re-Imagination of Files & Folders...

### THEN...

Print Copies / Storage Cabinets / Color Tabs



### NOW...

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



## Re-Imagination of Selling Digital Goods...

### THEN...

Dedicated Shopping Site / Fulfillment Infrastructure



### NOW...

(Gumroad)  
Democratization of Commerce / Leverage Distribution  
Platforms such as Twitter / Facebook



## Re-Imagination of Cash Registers...

### THEN...

Big + Odd Looking Machines / Receipt Printers Cash Drawers



### NOW...

(Square)  
Simple + Elegant Tablet + Square Reader /  
Email Receipts / Touch Signing



## Re-Imagination of Magazines...

### THEN...

Piles of Print Copies



### NOW...

(Flipboard)  
More Content / Always Up-To-Date /  
Personalized / Access Everywhere /  
Interactive (Video + Audio) / Share



## Re-Imagination of Recruiting / Hiring...

### THEN...

Job Fairs / Campus Recruiting Events /  
Paper Resumes



### NOW...

(LinkedIn)  
Online Resumes / Social Relevancy For  
Recruiters / Searchable Skill Sets /  
Endorsements / Recommendations



## Re-Imagination of Borrowing / Lending Money...

### THEN...

Brick 'n Mortar Bank Branch / Paper  
Applications / Lengthy Approval Process

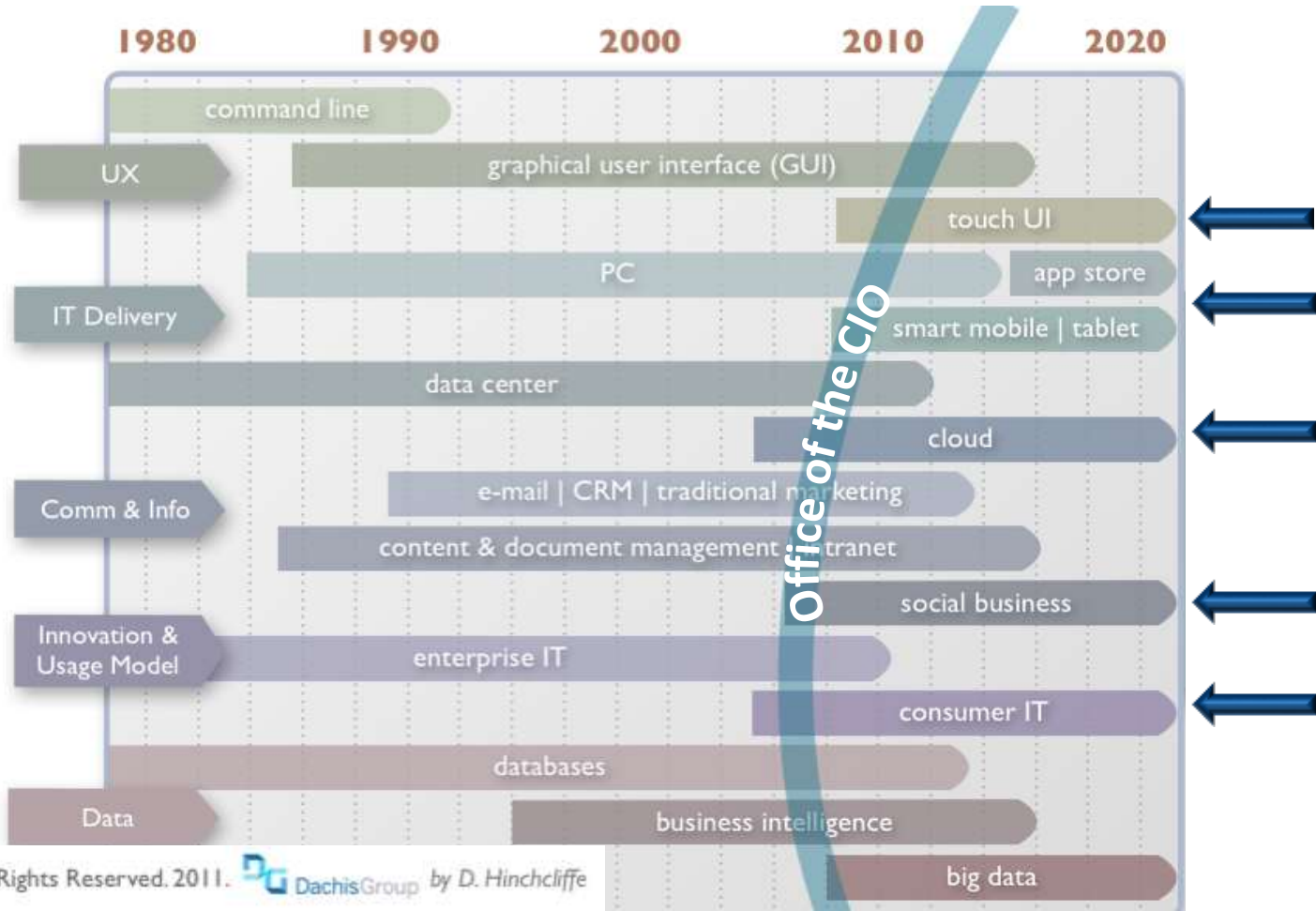


### NOW...

(Lending Club...)  
Online Interface / Apply & Get Funded in Days  
Lower Interest Rates For Borrowers / Better  
Diversification / Returns For Investors



# Disruptive IT Paradigms for the Next 5 Years



When we're not closed  
We're opened!

## OPENING HOURS

MONDAY	9:00 - 5:30
TUESDAY	9:00 - 5:30
WEDNESDAY	9:00 - 5:30
THURSDAY	CLOSED
FRIDAY	9:00 - 5:30
SATURDAY	9:00 - 5:30
SUNDAY	CLOSED

Anywhere. Anytime, Anything!

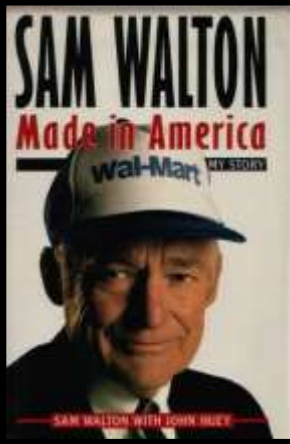




# New year, same old customer?



BUSINESS HOURS		
MON	8:00	TO 10:00
TUE	8:00	TO 10:00
WED	8:00	TO 10:00
THU	8:00	TO 10:00
FRI	8:00	TO 10:00
SAT	9:00	TO 6:00
SUN	CLOSED	TO CLOSED



There is only one boss. The customer. And he can fire everybody in the company from the chairman on down, simply by spending his money somewhere else.

- Sam Walton 1977

**Acquiring a new customer can cost up to 5 times more than retaining a current customer**

Bad Service. Hate It. Spread It.



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# Ever Connected, Always On, Smarter Customers

ClipartOf.com



Your customers are unique human beings



power



Your customers



Your customers expect more than just product or service



Your customers need much more than a special offer



24x7

Connection from different touchpoints



# JUST...



**LISTEN**

to

**customer**



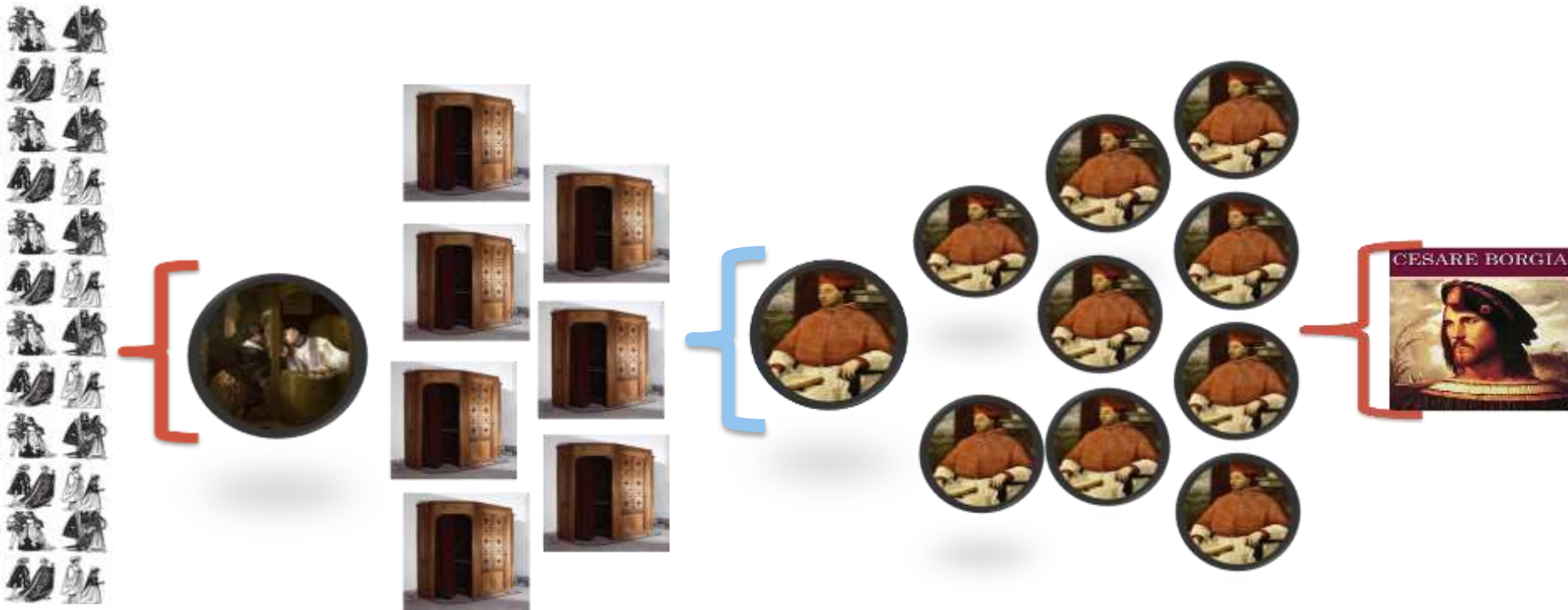
Every-  
thing  
you  
need to  
know is  
out  
there

*Consumers are sharing  
their experiences and  
preferences with  
others*

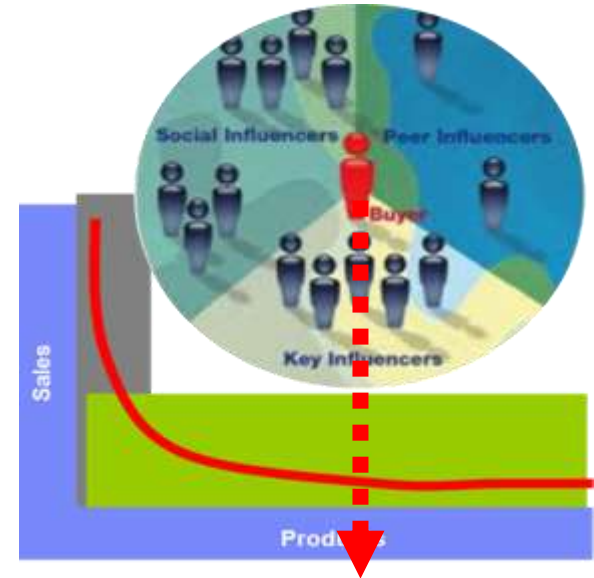
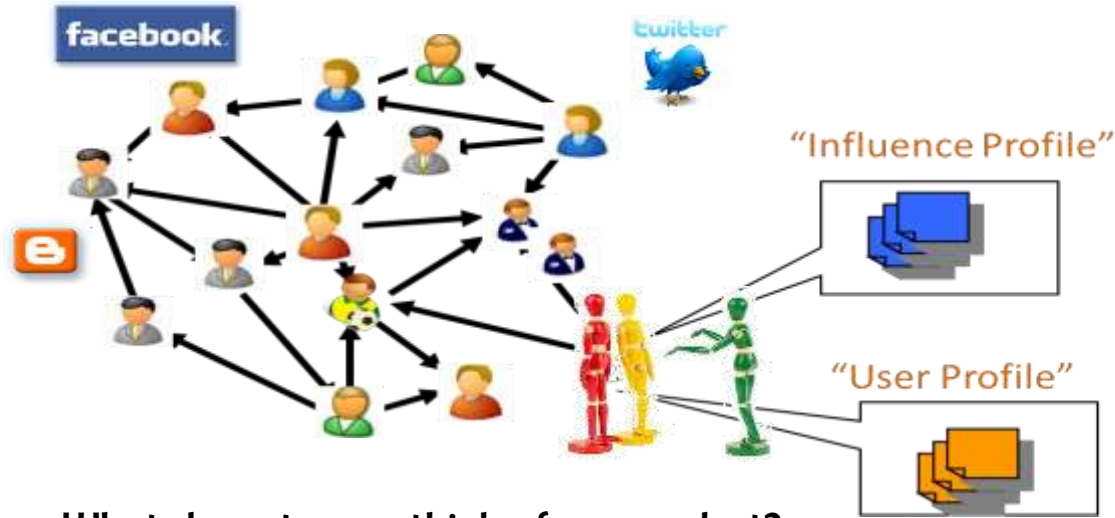
**You don't have to drive blind!**



# How did the archbishop know who to kill?



# This is how you'll know what your clients want



- What do customers think of my product?
- Are they happy with the services?
- How do I impact my customers' perception of me?
- What do customers like about my competitors?

IBM Research – Haifa



# Don't let Facebook become boring!

Call us



Not effective,  
time consuming



Visit us on Web site



Boring, stale & stagnant



Follow us on Facebook



You can "like" it,  
so that's cool!?



What next?



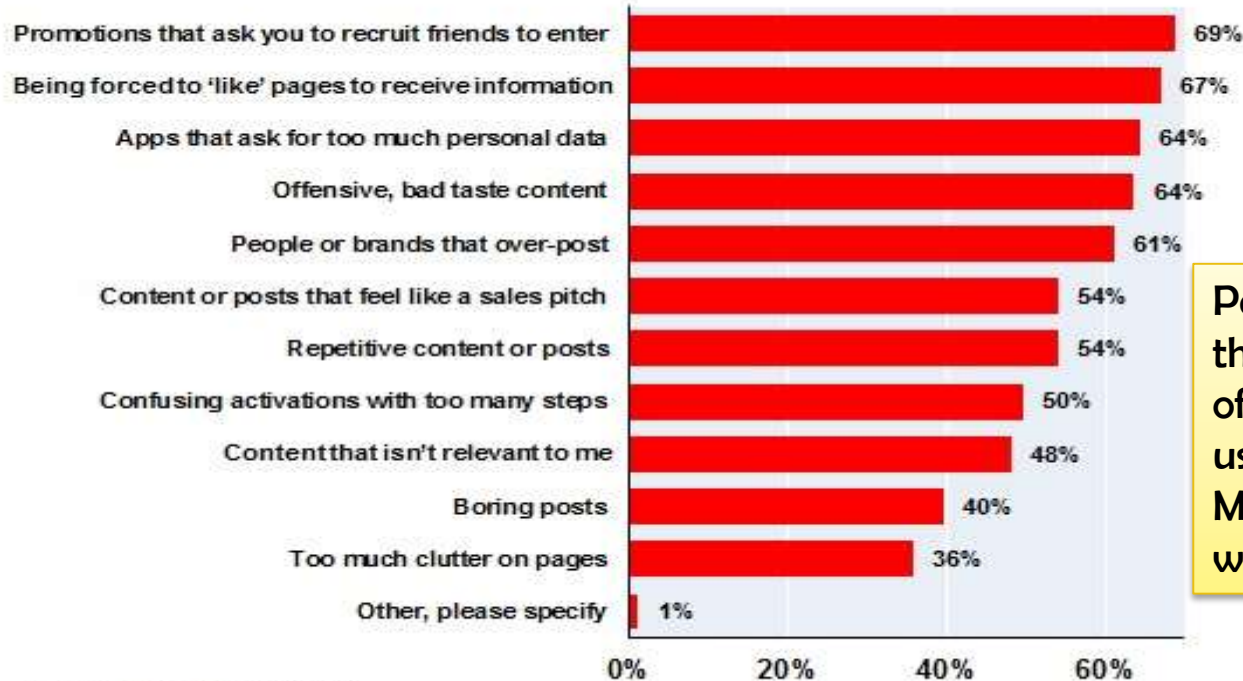
www.chinatravel.com - 09406336

If you know your customers as individuals now - you can do much better



# The End of Lazy Marketing

## Social Media Turnoffs %



n= 674 December 2012



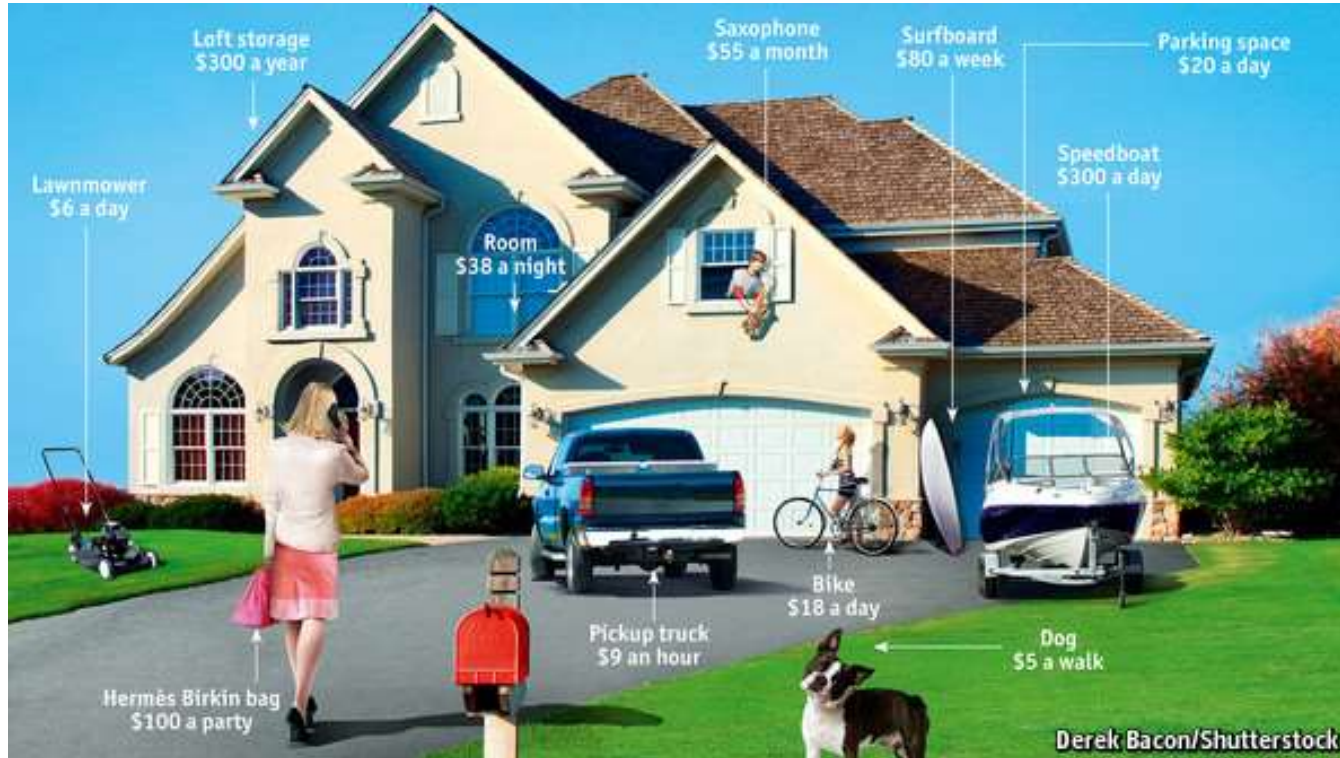
People enjoy consuming content that is appropriate for the context of the social platform that they're using.

Make content appealing that users will want to consume it

*Source: [leaderswest.com/2012/12/14/people-dont-like-social-media-marketing](http://leaderswest.com/2012/12/14/people-dont-like-social-media-marketing)*



# The Rise Of The Sharing Economy



**What's mine is yours,  
for a fee**

LAST night 40K people  
rented 250K rooms  
in 30K cities  
in 192 countries

**ONLINE**





# Social Enterprise defines/supports the new “non-stop” customer

To support the new “non-stop” customer

Do you have **tools?**



Do you have **understanding?**



Ever Connected, Always On, Smarter Customers



# Good Product – Bad Experience



There is no chance of anyone taking a mortgage and thinking it was a good experience



I was asked 3! times to put my ID in one conversation of cancellation and appointment setting

Arrogant and aggressive customer service assuming to know what is good for me



And no, I don't have a fax at home



It's not a technology!  
Think about your own experiences, expectations, and preferences as a customer

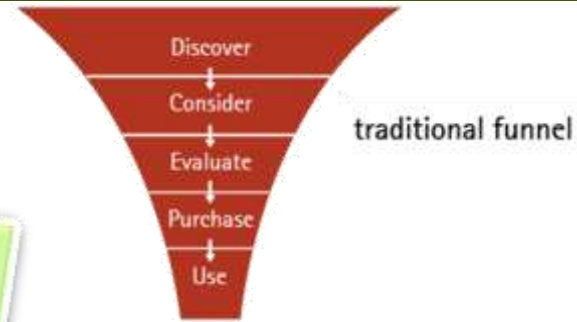


# Customer Experience Management

When you buy something, you want it to be:

- easy to get
- function flawlessly
- and move forward in your life

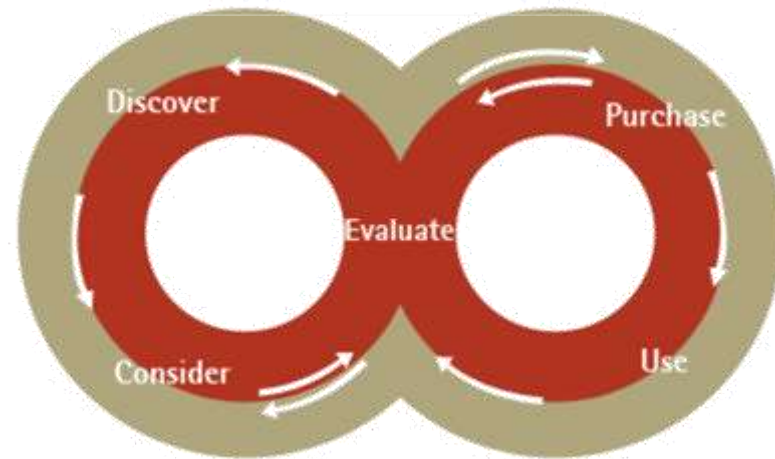
The cost of getting - and the danger of losing - customers is exceedingly high.



Nonstop-Customer Experience Model

That is what **CEM** is all about:

- making it easier and nicer to get the service/product we want
- ensure that clients will say good things about us and come back



Open content/channels  
Brand-controlled content/channels



# CMO-CIO Conflict of Cultures

CMO

the balance of power between the individual and the service provider is changed

engaging with customers throughout the entire customer lifecycle

analyze the financial results of marketing initiatives

Deliver value to empowered customers

Capture value, measure results

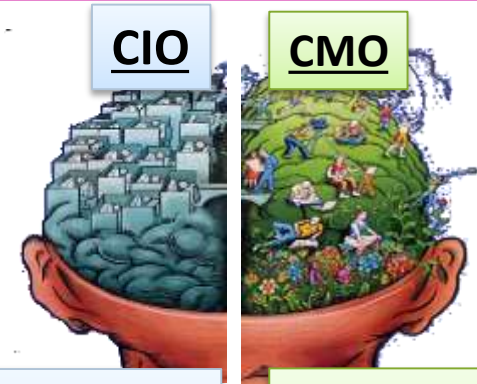
Foster lasting connections

New digital, analytical skills and tools

CIO

invest in new techn. & analytics to get a better grasp of how individual customers behave

building online & offline communities and collaborate to fuse the internal & external faces of the enterprise



Standards, sees the whole picture / architecture, prefers to take more time to “get it right”

Time to market is everything accepts mistakes as a given



# If CMOs are From Mars, It's Time for CIOs to Visit

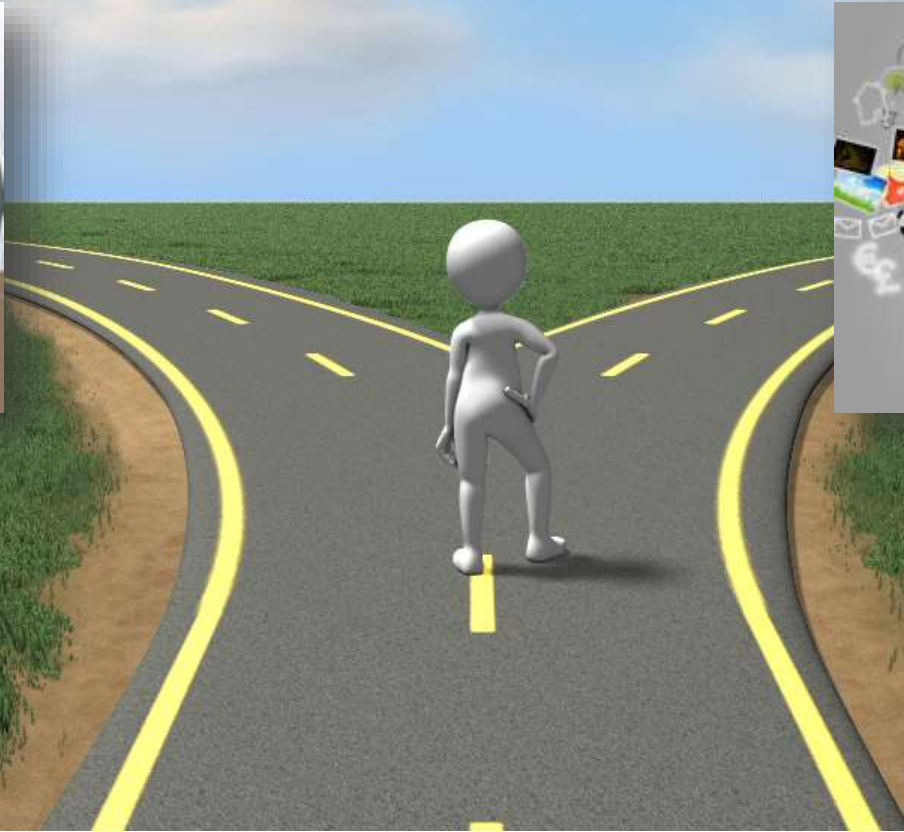
- Gartner : Through 2016, 80% of marketing organizations will **source 80%** of their technology needs **externally**
- Companies that have solid **cooperation between the CIO and other VPs** have **4 times** chances for success **than** other companies where the cooperation with CIO was weak

Digital conversations among C-level executives can raise Digital IQ

PwC's 5th Annual Digital IQ Survey

Strong Ties mean X4 becoming top performers





# Non-stop customer is SoMoClo

**6 BILLION**  
mobile users

40B apps downloaded since 2008

20B  
in  
2012

In **2013** more people will access web through mobile device than computer

SMS enabled phones

75%

Smart phones

27%

1B & 600M  
mobile monthly active users

100 M  
users

would you rather?  
Are you more willing to give up your mobile phone for a week OR...?

70%  
ALCOHOL

63%  
CHOCOLATE

55%  
CAFFEINE

54%  
EXERCISE

50% OF ALL INTERNET SEARCHES ARE DONE USING SMART PHONES

# Future Displays and Augmented Reality



Samsung bendable smartphone

iWatch

GLASS

Eye scroll

Flexible E-Paper Display

Plain reality?  
It's so boring...





# Smarter Things

- Wearable smart electronics in shoes, tattoos and accessories
- It's not about single technology, but a concept
- Embedded sensors in devices, augmented reality, remote sensing, services on top of connected products, machine-to-machine communication

*Smart Pill & Bottle*



You have fever  
Take a pill right  
now!

I don't like  
this tie



I need to be  
changed!



# Mobile App Development Trends For 2013

- Apps will be increasingly contextual and personal
  - ▶ Mobile predictive analytics within apps and complex event processing
  - ▶ Next best action - human pattern matrix – how people interact with apps
- Enterprises are moving to a **cloud development model**



*Source: ClipartOf*



# MBaaS - Mobile Backend-as-a-Service

A mobile storm in cloud

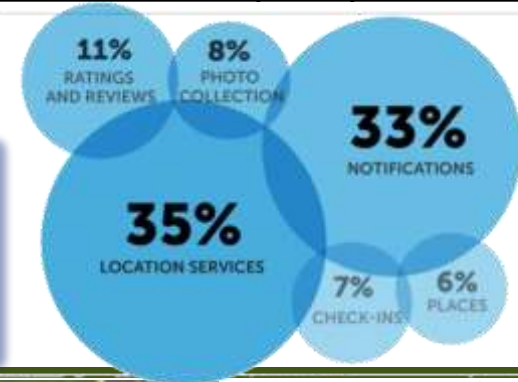


Mobile, wireless & connected world:

- ▶ more bandwidth
- ▶ faster broadband
- ▶ remote info access via multiple devices
- ▶ cutting costs
- ▶ storage



Cloud services developers expected to use



2013-2014  
the marker for cloud-based  
mobile apps is projected  
to increase by 60%



# Who are the new era winners?

Google™

amazon.com®



facebook®



# Consumer Compute Market 2013

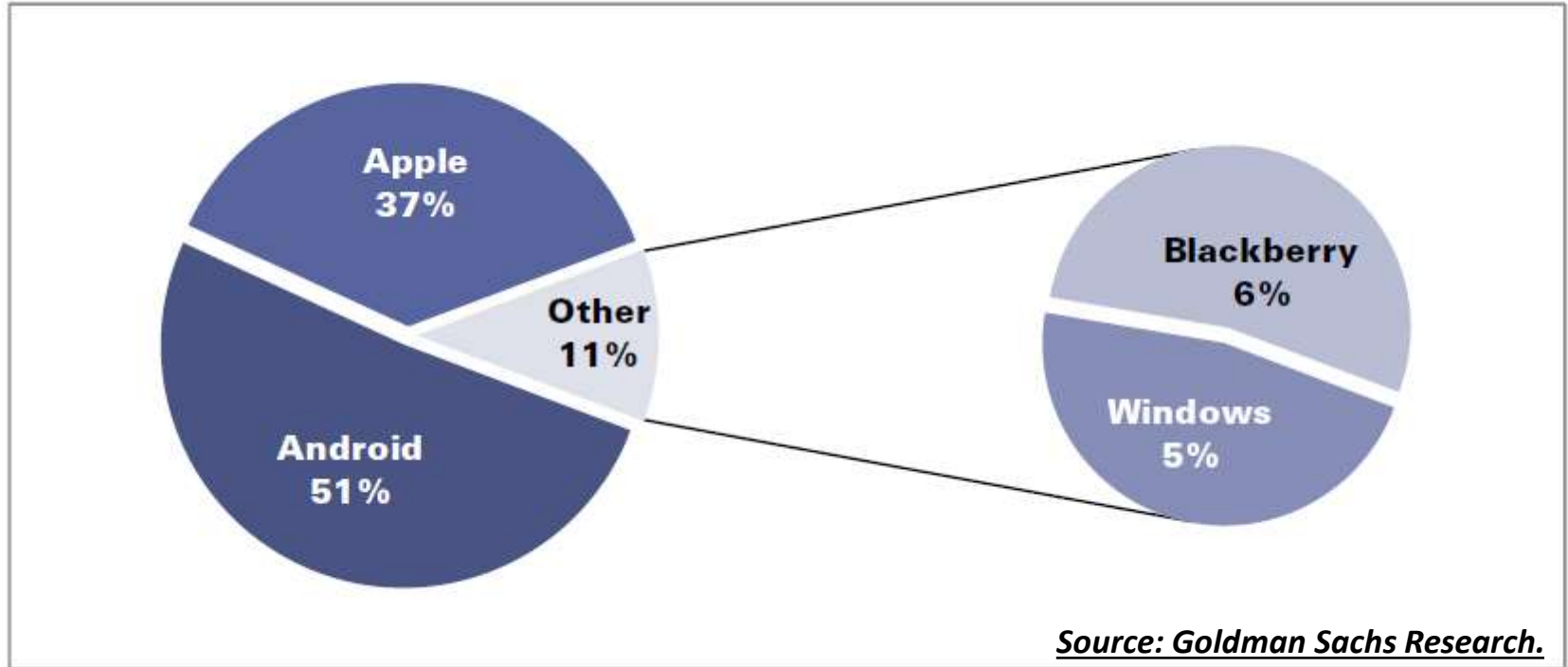
	2011	2012	2013E
<b>Tablet</b>			
iOS	56%	51%	54%
Android	43%	48%	41%
Windows	1%	1%	5%
<b>Smartphone</b>			
iOS	20%	20%	17%
Android	47%	55%	53%
Windows	2%	3%	5%
<b>Total Consumer Compute</b>			
Apple	23%	23%	22%
Google	33%	43%	43%
Microsoft	25%	19%	18%

**Source:**  
**Goldman Sachs**  
**Research 2013**

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# What type of smartphone do you have?

End of 2012

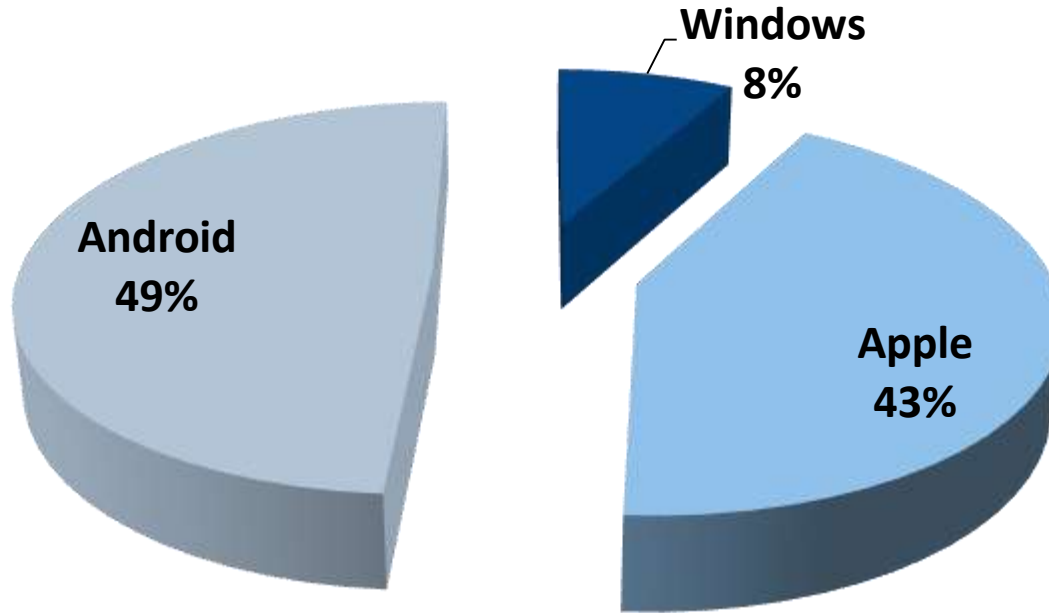


Source: Goldman Sachs Research.



# A New Smart Phone Purchase 2013

*If you plan to purchase a new smart phone in the next six months, what type of smartphone will you purchase?*



# Israel 2013



iPhones: 1,600,000  
iPads: 600,000  
iPad mini: strong entry



Phones: 1,800,000  
Tablets: 200,000  
Galaxy note 2: positive responses



Real competitor, last to enter, a lot will depend on a successful ecosystem



# Demand for notebooks continues to decline

EMEA PC performance : Q3 2012 vs Q3 2011

Client PCs: -1.8%



Desktops:  
-5.8%



Notebooks:  
-1.9%



Netbooks:  
-42.9%



Pads:  
27.8%

Consumer PCs: 5.6%

Enterprise PCs: -13.1%

Pads will dominate  
the PC market  
by 2016

*Source: Canalys forecasts,  
Netpad Analysis, November 2012*

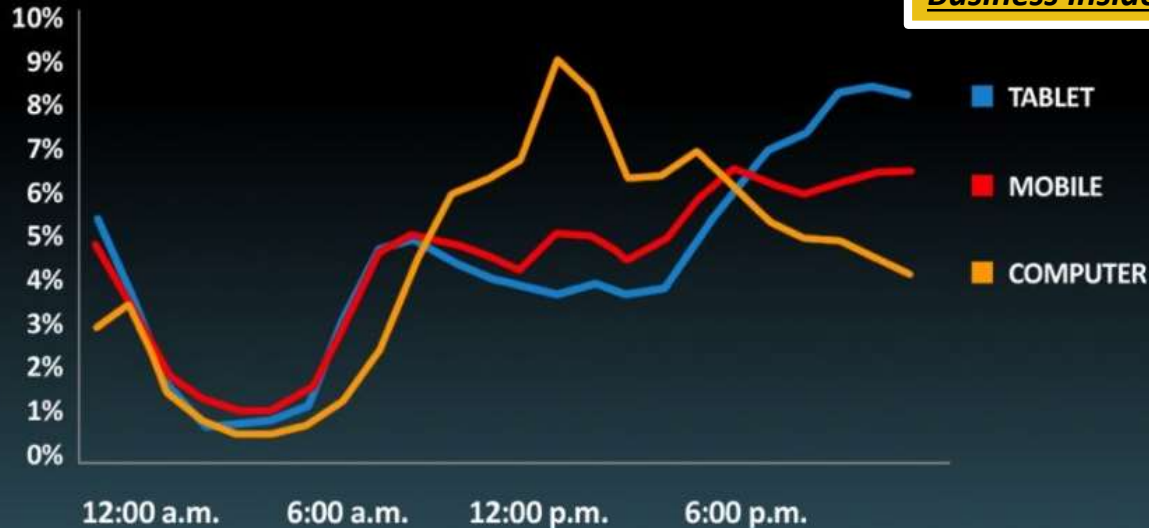


# Is the PC dead?

- No, the home PC is dead, people still use PC at work
- Consumers are going to buy more tablets and fewer PCs

- People buy more than one tablet per household
  - ▶ It's personal device, a fun gift
  - ▶ The trend is much stronger among kids

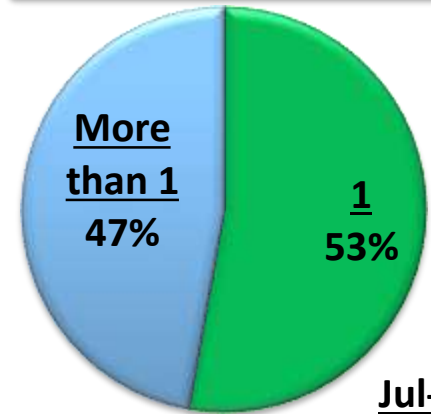
Share Of Device Page Traffic Over A Day:



Source:  
Business Insider

Source: comScore, Telefonica, Macquarie Capital (USA), December 2011

How many tablets are  
in your household?

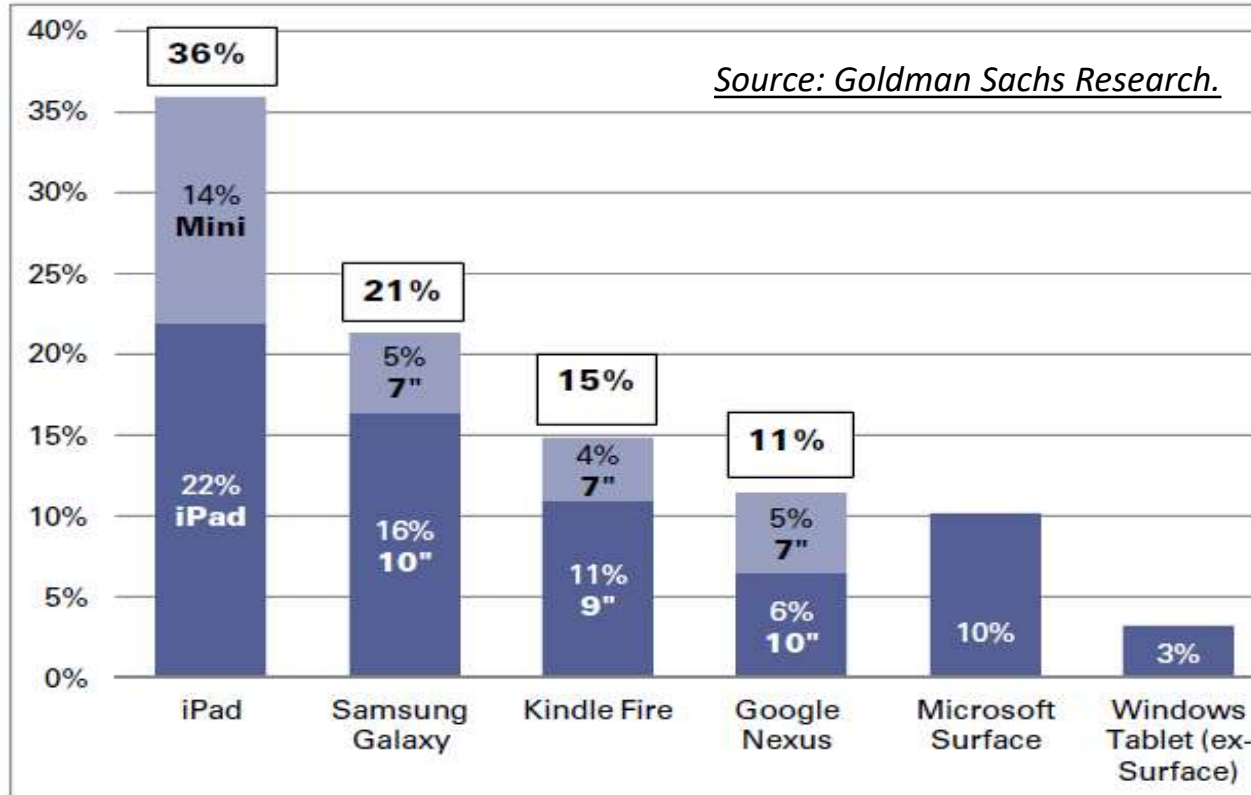


Jul-2012

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# A New Tablet Purchase – Consume market

*If you plan to purchase a new tablet in the next six months, what device do you plan to buy?*



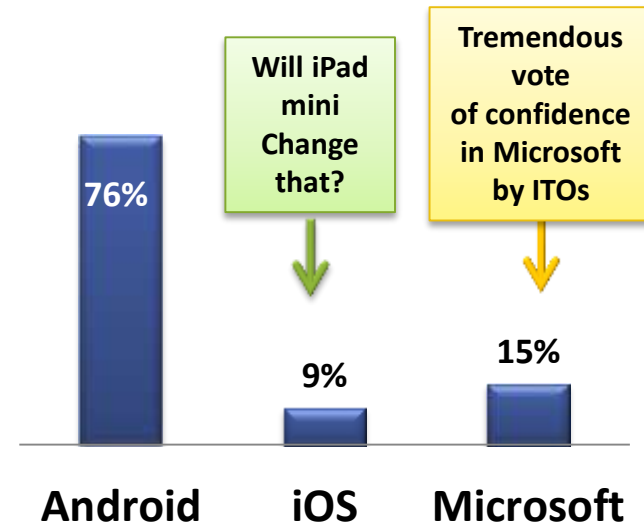
## Israeli consume market:

- Strong preference to iOS tablets
- Great interest in iPad mini

# Israeli ITOs B2E OS preferences

- 2012: Strong preference for Android OS as enterprise solutions:
  - ▶ Although open OS  $\neq$  better
  - ▶ Non jailbroken Apple devices provide much better protection
    - ✓ 1/10 of HD calls compared to Android devices
- Great interest in Microsoft 8 tablets
  - ▶ In-house knowhow, Office, reduces the need for MDM

**Israel ITOs:**  
**What is the best OS for**  
**B2E apps development?**



**Source: STKI 2013**



# Un-matured Market

## Clients perspective

- Lack of strategic planning:  
What are the needs?
  - ▶ Consumer friendly app
  - ▶ What kind of content try to expose to customers:  
access to information forms/ location based?
  - ▶ Security concerns
- What is the best way to develop mobile apps: Native, Hybrid
- Which OS should be considered: iOS, Android, Windows
- Lack of internal knowhow and skills
  - ▶ Development, UX
- Lack of best practices guidance

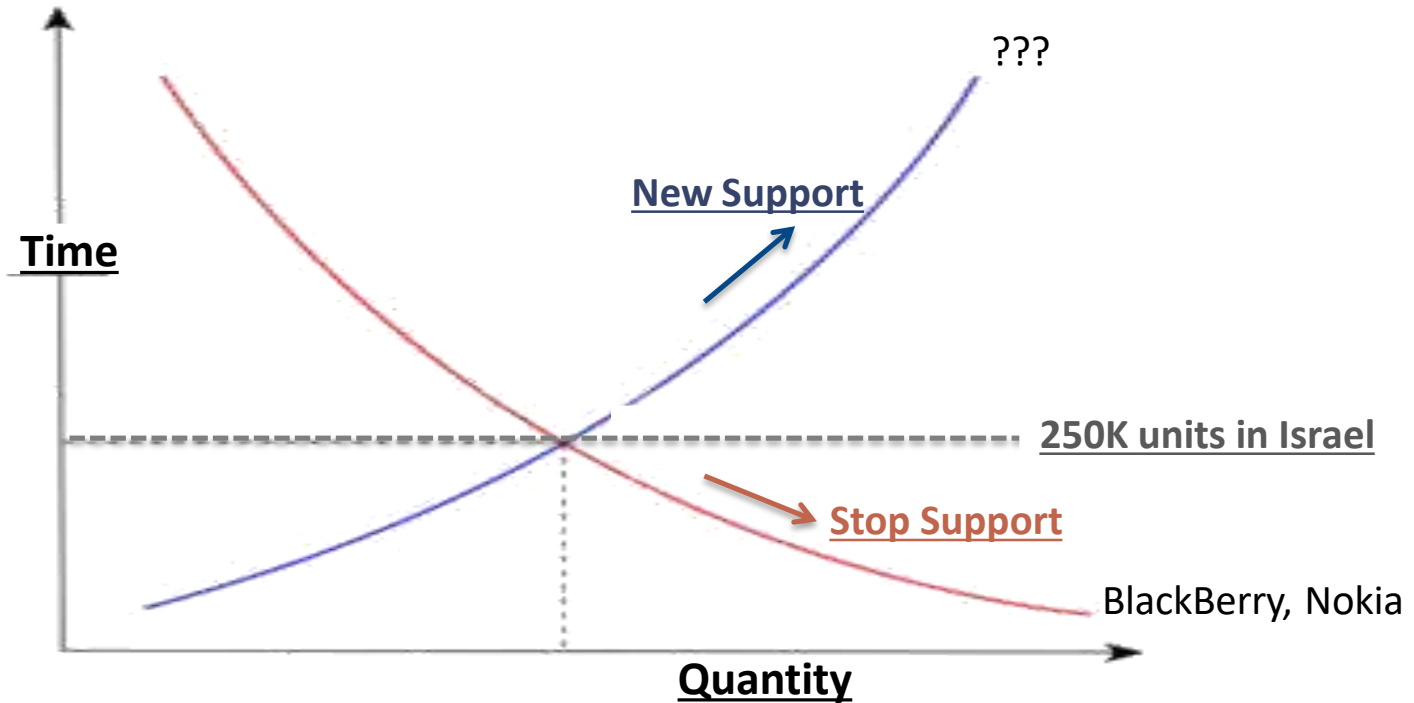


## Providers perspective

- Mobile solution landscape instability
  - ▶ Mergers and acquisitions
- The best way to develop mobile apps depends on the vendor trying to sell
- Lack of experience and knowledge
- Lack of best practices guidance



# OS and Devices Support



# IT Involvement in Mobile Projects

- A lot of consumer app development projects led by marketing department
  - ▶ Although use of digital media companies with lack of IT knowledge (security) and integration capabilities is a fad trend
  - ▶ Sometimes IT is not involved at all in mobile app decision making (involved only in maintenance stage)
- IT has to be more responsive, pay more attention to demand and not make decision based only on **MAINTENANCE, COMPLEXITY OR COSTS**



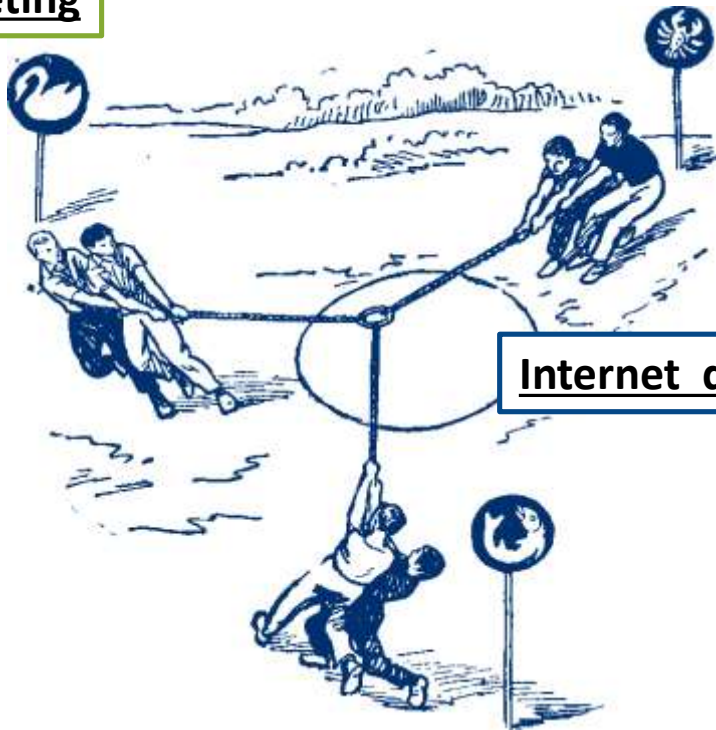
# In-house Conflicts

## Marketing

Best UX, app usage  
**Native app**

## IT Mobile department

UX, ease of maintenance,  
Version distribution, bugs repair  
**Mobile development platform**



## Internet department

- Web is the main channel
- HTML skills in-house
- As much reuse and control as possible
- Fear of losing budgets & control

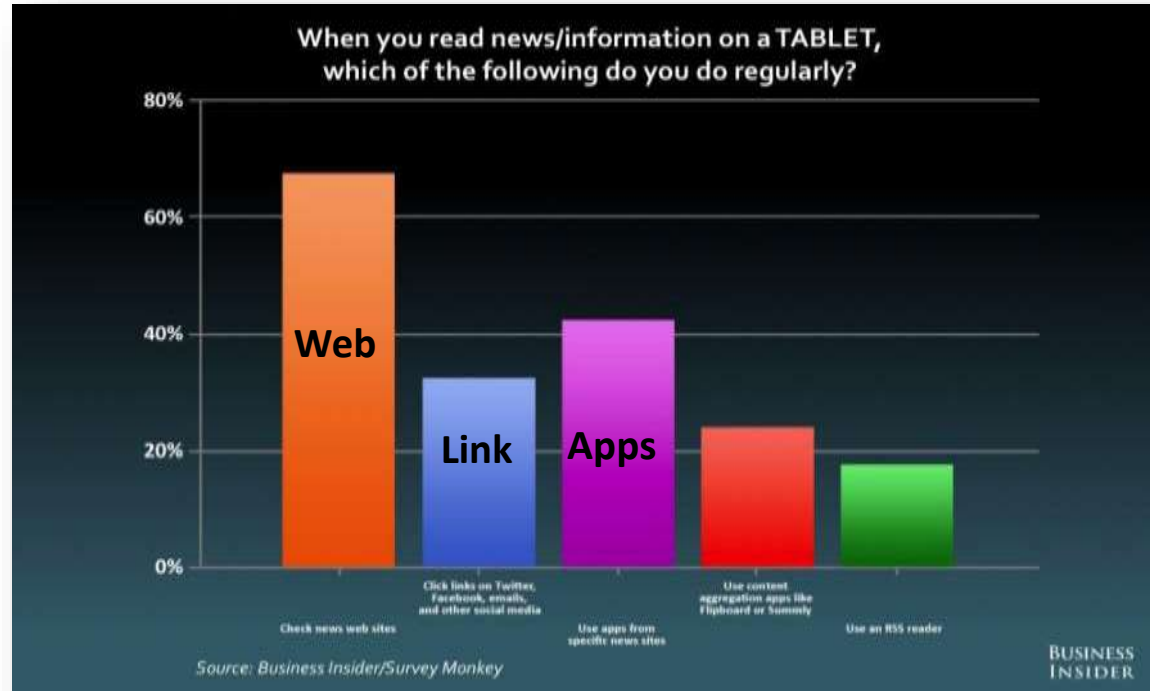
**Mobile web - RWD**





# Will Websites go away in favor of apps?

NO, sometimes people still like to browse Web from mobile devices



Source:  
Business Insider



# Responsive Web Design

How responsive is your website?

Content, navigation, functionality and design adaptation to the screen and type of every device

Should we remove content & functionality from the mobile version?

OR

Should visitor be able to access the same content, regardless of which device they use to visit the website



Starbucks



# Mobile as an extension of Web site

- (Multi) Channel centered strategy instead of touchpoint or consumer centered
- Scale down web experience and leverage existing digital content and infrastructure is low cost but...

**MISSING a POINT** approach



# Mobile Is Not Just Another Channel

Mobile is **beyond a smaller version of a PC-based experience**

- Sometimes mobile becoming the **primary digital touch-point** between consumers and brands
  - ▶ especially for smartphone owners
- Enhance existing offerings and **creating new** ones
- Ongoing, more **personal relations** with customer



DVR programming



Camera



Guidebooks



Matching paint colors



Level



Flashlight  
(e.g., Nationwide Auto's Accident Tool Kit on the iPhone)



Navigation solutions  
(e.g., from Google or Nokia)



Banking services  
(e.g., USAA's check deposit service)



Unlock car doors

Source: Forrester



# Fundamental change of B2E/B2C



Tablets deployment to field workers in place of clipboards, paper, and pen



Advanced services (apps) based on customer preferences and location for promotions and coupons



# User eXperience

- App development create demand for **simplicity by** high levels of **complexity** underneath
- UX is much more than a design, it's a whole new technology
- Today 30 to 50% of consumer apps development goes to UX
- High demand for UX developers





If people don't like your app, they won't use it

If people can't find the info it contains, they'll fail at the task they need to perform

If people don't trust your app, they won't use it for anything "important"

# UX companies in Israel

AMAN

Matrix

Puzzlehead

*In alphabetical order*

ARTIS

Moblin

Real  
Commerce

Cognit

NESS

TZUR



Inkod

Netcraft

UI

Malam  
Kuchi

NGSoft

YKM





# Applification or Advanced Services

- **Beginning of the end of the apps!**
  - ▶ **From stand-alone app to services** . Instead of building additional loyalty card, Apple and Google will offer you to provide your service on their platform. The platform itself will be exposed to these additional services
  - ▶ **Application Programming Interface (API)** - exposing data in existing systems through transforming existing services with modern APIs

*Source: Mashery*



# Open APIs – New Route to Reach Customers

- Competitive advantage – it's all about connecting with customers, suppliers and partners– not just smartphone apps!
  - ▶ Websites
  - ▶ enterprise apps
  - ▶ TV apps
  - ▶ refrigerator apps

It's very difficult to create a set of products that will be right for everyone.

With an API, you don't have to



Being present *every* time your services are relevant in *every* app your target customer *ever* uses.

Source: Mashery



# Mobility AND API Strategy

- Accenture: 54% of WW organizations are developing an API strategy to go hand in hand with their mobility strategy
- Mobile apps access to legacy systems
- Israeli ITOs are still not there



# Consumer Apps Israeli Trends

- Main focus on UX – primal tendency to native development
  - ▶ Apple – best experience, heavy users
  - ▶ Android - concern for lack of new version support, lack of compatibility
- Everyone knows it is a “must be” situation:
  - ▶ Innovation, prestige, technology capabilities
- Business case and ROI is not clear yet
  - ▶ Apps usage is constantly growing



# Consumer Apps Israeli Trends - Continue

- Although it hurts UX - most of the Israeli org. are shifting to hybrid development (including existing native apps) due to time, resources and costs saving
- It's expensive to have 3 different native data code bases and it's very hard to build a new feature and simultaneously release it this way



# How much costs exactly hybrid development saves?

- In time perspective – it is possible that there would be no significant cost difference between native and hybrid development
  - ▶ UX importance increasing
  - ▶ Market flooded with new smart devices
  - ▶ Hybrid app saving is not in a development stage
    - ✓ ~20% saving in maintenance



# HTML5

## Saving heavy costs on:

- ✓ native multi-platforms development & maintenance



## Compromising the UX

- ✓ Zero usage
- ✓ Not innovative message

## How much exactly does it save?

- ✓ Greater investment for each device adjustment

- ✓ HTML5 will reach the native level of maturity in 2015
- ✓ Major market players have no interest in supporting it

## STKI opinion:

It doesn't matter if it costs less or if it's more convenient to manage. Your clients know what a great app is supposed to look like. If you don't give it to them, they will find it somewhere else



clipartof.com



# Social Mobile Cloud Employees

- Increasing demand for organizational content and core data available anywhere, anytime (24x7)
- **“Me” economy** - IT can't force employees to use standard corporate device or SW
- **BYOEverything**: smartphone, Gmail, tablet, DropBox, etc.
  - ▶ Consumerization of IT (CoIT) - One size/ OS doesn't fit all
  - ▶ Re-think your policies
  - ▶ WEBSITES vs Apps : which, when, with what





# Social Mobile Enterprise?



*Source: Salesforce*



# B2E App Development Israeli Trends

- Main focus – project costs and solution maintenance
- High maintenance support due to BYOD trend
- Most ITOs believe in:
  - ✓ In near future traditional (desktop) app development will be based on HTML5 and enable reuse from desktop to mobile
  - ✓ Hybrid development approach



*This is the chance for IT to become a hero again!*

## **STKI opinion:**

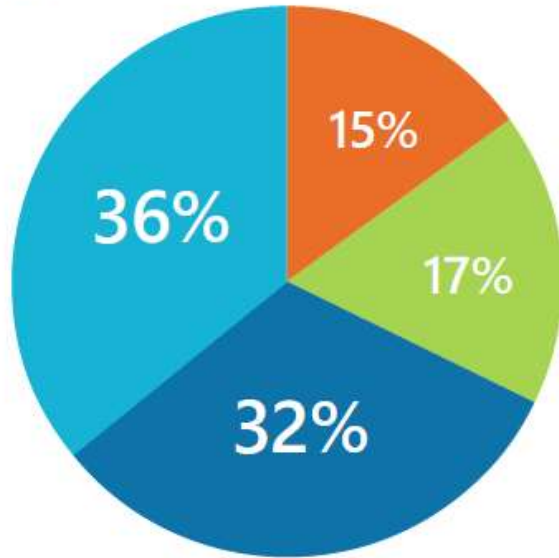
**You have to treat enterprise workers the way you treat consumers**



ClipartOf.com/30577



# Worldwide: What is your preferred approach for Mobile App Development?



ONE "NATIVE" IMPLEMENTATION PER TARGET PLATFORM (I.E. IOS, ANDROID, WINDOWS PHONE, ETC.)

ONE "NATIVE" IMPLEMENTATION PER TARGET PLATFORM + ONE HTML IMPLEMENTATION "CATCH ALL" FOR OTHER PLATFORMS

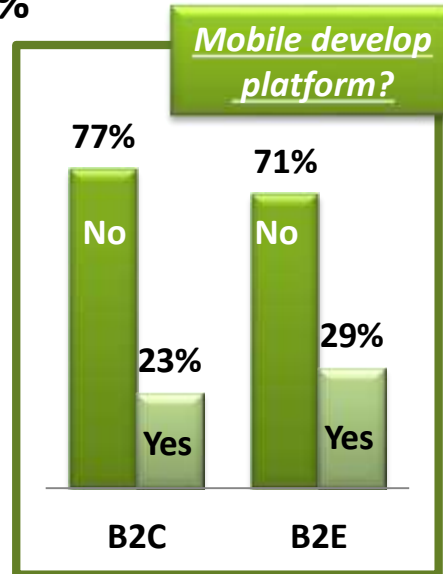
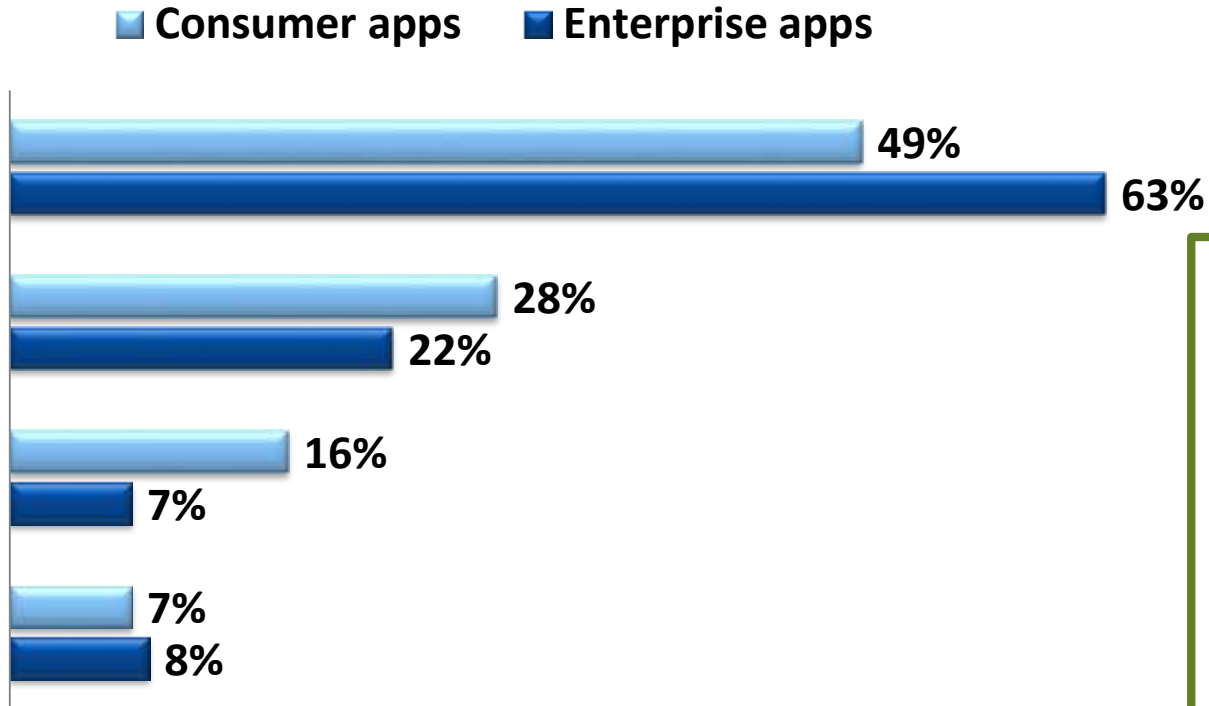
HYBRID APPS

PURE HTML5 IMPLEMENTATION FOR ALL PLATFORMS

Source: KendoUI 2013




















# Israel: What is your preferred approach for Mobile App Development?



Source: STKI 2013



# App Development for Multiple Platforms

	Native App	Hybrid App	WEB App
<b>Develop approach</b>	Platform-specific Native SDKs	HTML5 + Native container, installed on device	"pure" HTML5
<b>Getting the app</b>	 App Store	* Apple can cause delays!  App Store  Google play  Windows Store	 Mobile browser
<b>UX</b>	Best experience, the most access to underlying device performance and capabilities	Less than native experience	UX is not as good as native
<b>Best for</b>	Consumer apps with LBS, daily activity	Apps with a lot of changes in information	App or data not highly used
<b>Access to data</b>	 ONLINE  OFFLINE	 ONLINE  OFFLINE	 ONLINE  OFFLINE
<b>Develop &amp; support costs</b>	  	 	

# Mobile Development Platform

- ITOs began looking for mobile develop. platforms in order to prevent twice the workload on UI, maintenance and every change or add-ons
- In such a dynamic ever-changing reality there is something comforting and familiar in a physical product

## Build mobile app business logic once and...

- develop native, web or hybrid app
- deploy multi platform (iOS, Android, Windows)
- on every device (smartphone, tablet, desktop)

“If it sounds too good to be  
**TRUE** then it probably  
**IS.**”



# Open Source Platforms

- Low cost:
  - ▶ Only 20% of the cost of commercial mobile dev. tools
- Meeting most of the requirements, having also vast range of complementary products:
  - ▶ GPS, camera, push notification support, etc.
- Better adjustment to customer's architecture
  - ▶ Not proprietary code
- Up-to-date support to every change in dynamic market

**Israel market is still missing out on OS!  
Lack of Israeli-supported, commercial OS options**

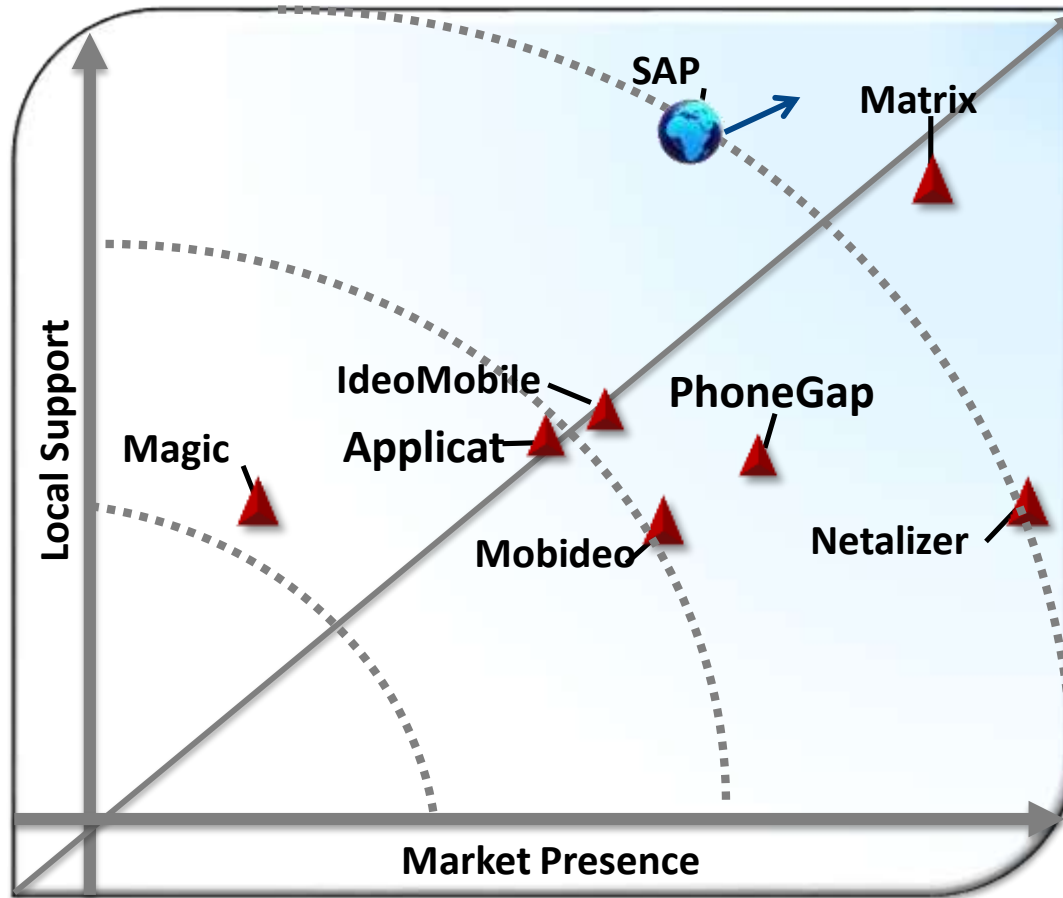
**Lists of OS players:**



[www.ohloh.net](http://www.ohloh.net)

[www.osalt.com](http://www.osalt.com)



# Mobile Enterprise (B2E) Platforms - Positioning of the Israeli Market



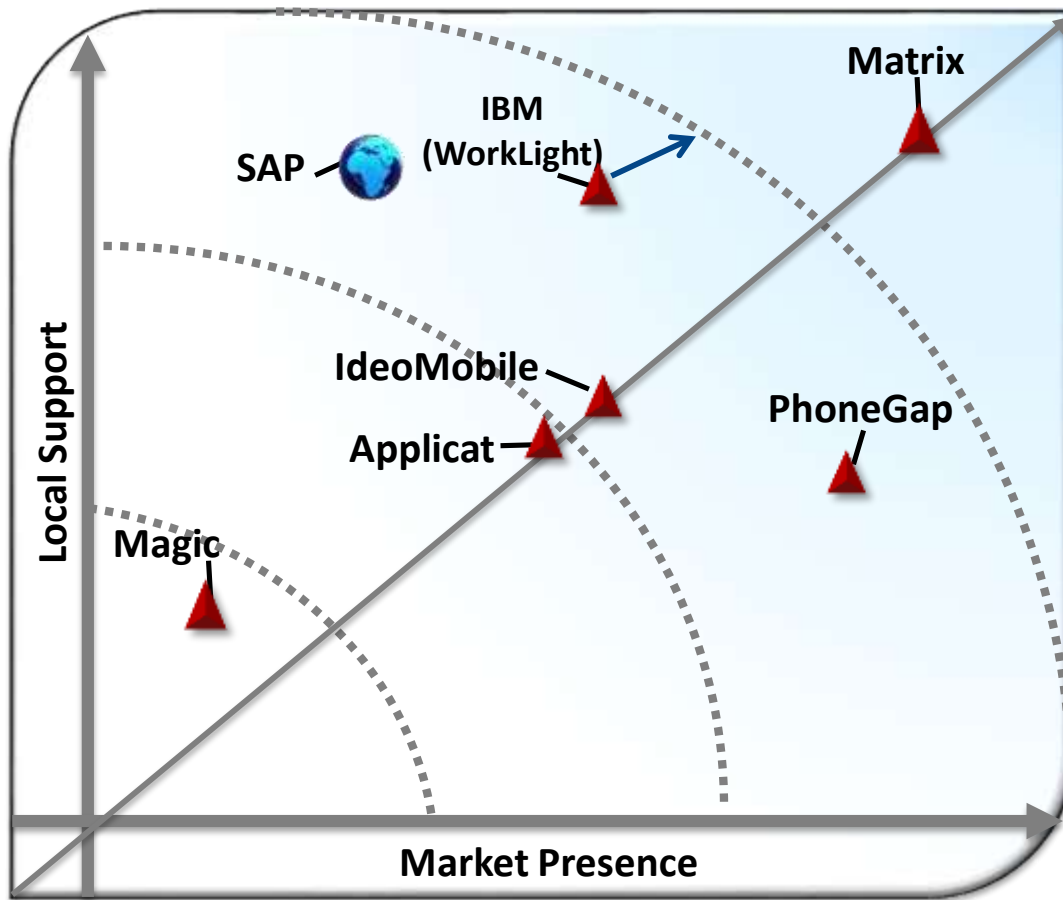
	Worldwide Leader
	Enterprise


**Vendors to Watch:**

- Kony
- Syclo
- HP Anywhere
- TIBCO Silver® Mobile



# Mobile B2C App Development Platforms - Positioning of the Israeli Market



	<b>Worldwide Leader</b>
	<b>Enterprise</b>

**Vendors to Watch:**

- Kony
- M2Active
- mConnect

# Mobile Apps Development - Services

<b>EWave</b>	Maccabi
<b>Gini-Apps</b>	Ynet-iPhone app, Ynet HD, Pango+, WinWin, Mapa, Beepit
<b><u>NGSoft</u></b>	Bank Leumi - trade, Bank Discount, Pelephone, TNT, Wozzon, BIS; 2012 – FIBI, CallVU, SellARing, Government ministries, Paradox
<b><u>Real Commerce</u></b>	Bank Leumi –augmented reality, MAKO, Clal, Bituach Yashir, Harel, Cellcom, VocalWall; 2012 - Menora Mivtachim, Excellence, leumi Card, Haifa Univ, BGU
<b>ONE1Mobile</b>	Scop Visa CAL, Schestowich 106, FSM SaaS – IEC, Paz, municipalities
<b>Malam-Team</b>	Bituach Yashir
<b>Experis</b>	Cellular media content distribution system, Bookkid, Redmatch
<b>Moblin</b>	Gillette, Avis, FiBi, Yellow, Leffe, Lexus, Loto, UMI Certified, Sugat
<b>Taldor (3base)</b>	Clarizen, Ozvision
<b>PoketLink</b>	Coca Cola, 3M,Muller, Dove
<b><u>YKM</u></b>	Isracard and Merk

# Mobile Platforms – Partial list 1

Product Name and Provider	Developer/ Representative	Product Description	Clients	New Clients	Implementor
<b>Touch Point (Matrix)</b>	<b>Develop</b>	<b>Platform for mobile solutions</b>	Bezeq, HOT, Ort, Danshir, IAA, Ma'ariv, Mifal Hapais, Bank Hapoalim, Police, Clalit, El-Al, Strauss, Shabas, Life Compass <b>Netwise</b> - Mivtach Simon, Migdal, Nana 10, GOV.IL, Isracard, Open University, Osem, Caesar Stone	Clalit Mushlam, Tel-Aviv Municip, Psagot, IDF, Bank Mizrachi, Prime Ministry Office, <a href="http://Gov.il">Gov.il</a>	<b>Matrix</b>
<b>SAP Mobile Platform Enterprise (Sybase + Syclo )</b>  *2014 <b>SAP Mobile Platform on-premise</b>	<b>Vendor</b>	<b>Mobile Enterprise apps Platform</b>	Mekorot	Bazan, Nilit, Israeli Ports, Technion, IEC	<b>Ness HP Exact ONE1</b>
<b>SAP Mobile Platform Consumer</b>			<b>Mobile banking and Payments</b>		

# Mobile Platforms – Partial list 2

Product Name and Provider	Developer/ Representative	Product Description	Clients	New Clients	Implementor
WorkLight (IBM)	Vendor	Mobile App platform		Supersal, Phoenix	RealCommerce ONE1, ELAD, Matrix
Applicat Mobile Platform™ (AppliCat)	Develop	Platform for mobile solutions	Meuhedet, Haifa University, World Zionist org. and more	UPS, Visonic, banks	AppliCat
Mobile App platform (IdeoMobile)	Develop	Mobile App platform	Bank Hapoalim, Discount, Maccabi, Leumi Card	CheckPoint, Hadasa	IdeoMobile



# Mobile Platforms – Partial list 3

Israeli Player	Product Name	Developer/ Representative	Product Description	Clients 2012	Implementor
Netalizer	ממ"א (מ"מ) אינטראקטיבי (Mobile SaaS)	Develop	Interactive Messaging System	בתי חולים (אסף הרופא, מאיר, יוספטל, ברזילי, רמב"ם ועוד), חח"י, רכבת ישראל, רשות הטבע והגנים, ארגון הצלה ישראלי, עיריות (ירושלים, אשדוד, רעננה, נס ציונה, אשקלון, ועוד), רשת מלונות דן, מירס, מנפאואר, משרד לאיכות הסביבה, משרד החקלאות, מנהל מקרקעי ישראל, קק"ל ואחרים	Netalizer
	Gazpacho (Mobile SaaS)	Develop	Mobile Reporting & Mission for field Force	לילית, שטראוס, מ.ג.ע.ר, דלק, שסטוביץ והגיחון, חח"י, תנובה, מגער, עיריית תל אביב, עיריית ר"ג, עיריית אופקים, שגריר, פז, דלק, קק"ל, חברות סקרים, משכ"ל, חוגלה ועוד	
El Ad		Develop		4Singles. iWater, Min. of Transportation, Intel	El Ad



# Mobile Platforms – Partial list 4

Product Name	Developer/ Representative	Product Description	Clients	Implementor
Syclo HP Anywhere	Representative	Mobile develop. B2E app Platform		HP
Kony	Representative	Mobile develop. app Platform		HP, Malam-Team
Metissimo	Representative	Mobile develop. app Platform		Software AG
Magic xpa	Vendor	Mobile develop. app Platform		Magic, Tirosh, Afek
mConnect (Infosys)	Representative	Mobile banking and Payments		Taldor
TIBCO Silver® Mobile	Representative	Mobile development B2E app platform		Yael

# List of Open Source Mobile Application Framework

QS Mobile App Framework	<u>Web site</u>	QS Mobile App Framework	<u>Web site</u>
<b>Open mobile IS</b>	www.openmobileis.org	<b>jQuery</b>	jqtjs.com
<b>PhoneGap</b>	phonegap.com	<b>Jo HTML5 mobile app</b>	joapp.com
<b>PhoneGap</b> Complementary Solutions	phonegap.com/tool	<b>ZK</b>	www.zkoss.org
<b>Rhodes Mobile</b>	www.motorola.com/Business/US-EN/Business+Product+and+Services/Software+and+Applications/Rho+Mobile+Suite	<b>Sencha</b>	www.sencha.com
<b>Appcelerator</b>	www.appcelerator.com	<b>iPhone, Android Framework</b>	
<b>iPFaces</b>	www.ipfaces.org		

## Social ,mobile enterprise





# What about IT? Same Old Struggles



# Clients' dissatisfaction with IT

- IT budgets are reduced regardless of organizational economic state
- Demand for involvement in technology decision making and cost transparency
- Low usage in existing systems and complaints regarding bad experience
- Independent development units in LOBs – mobile, BI, etc.

I know what I want and if you can't give it to me I'll get it somewhere else



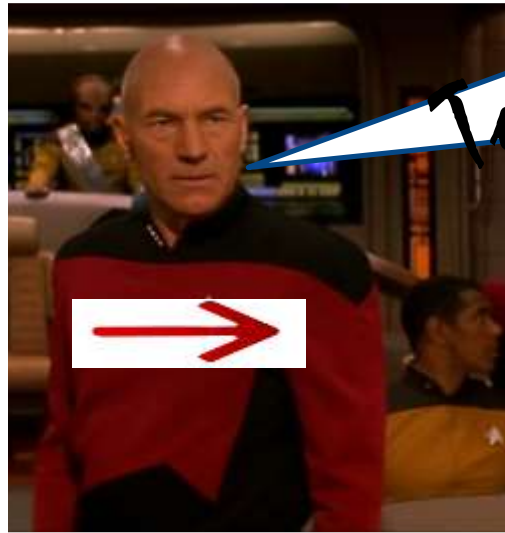
## Demand for IT support:

- mobility apps
- new end-user devices
- new customer-facing systems
- social business and collaboration tools

And they're only a credit card away from cloud computing solutions

# Experience (ME) Economy

From:



To:

Fasten your seatbelts,  
We're switching  
between eras



**IT monopoly era**

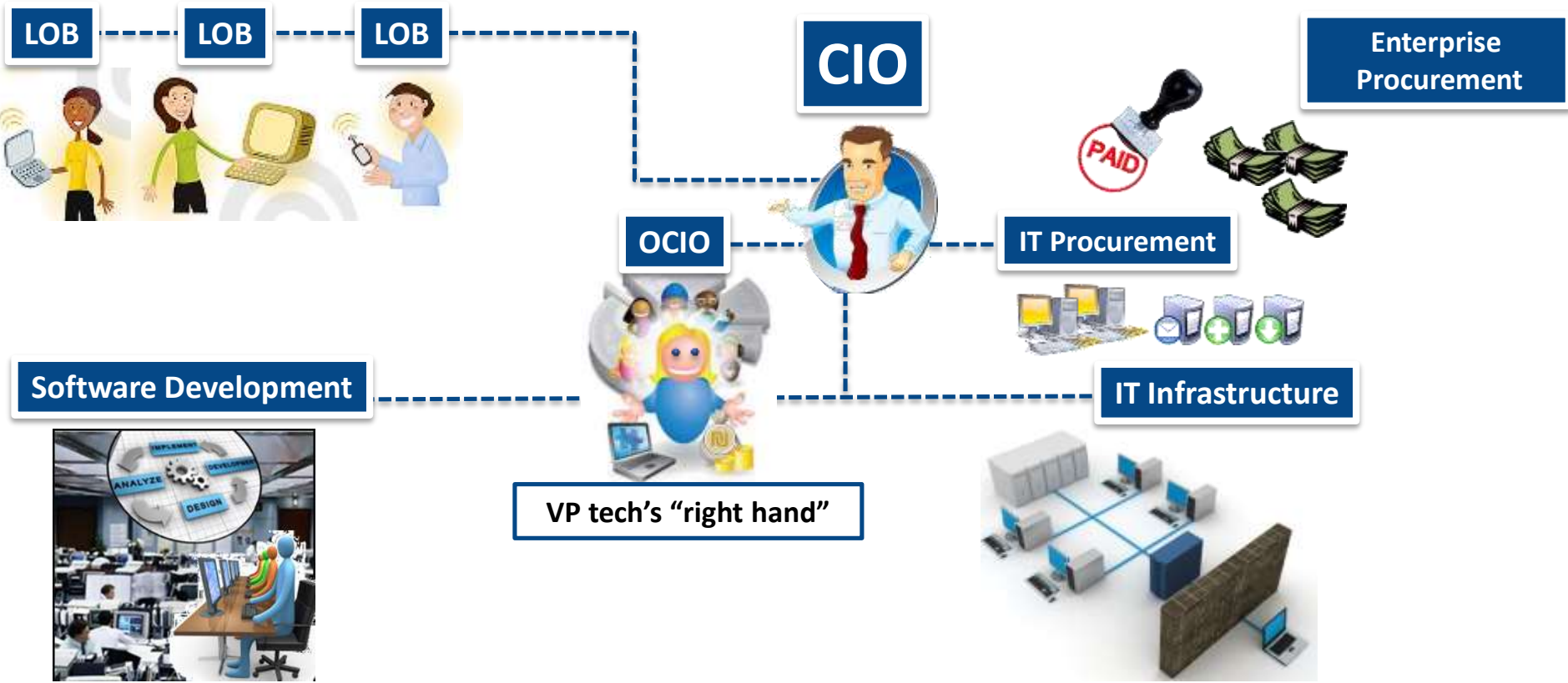
**Solutions dictated by IT**

**"Me" economy**

**Solutions that are ideal for Me!**



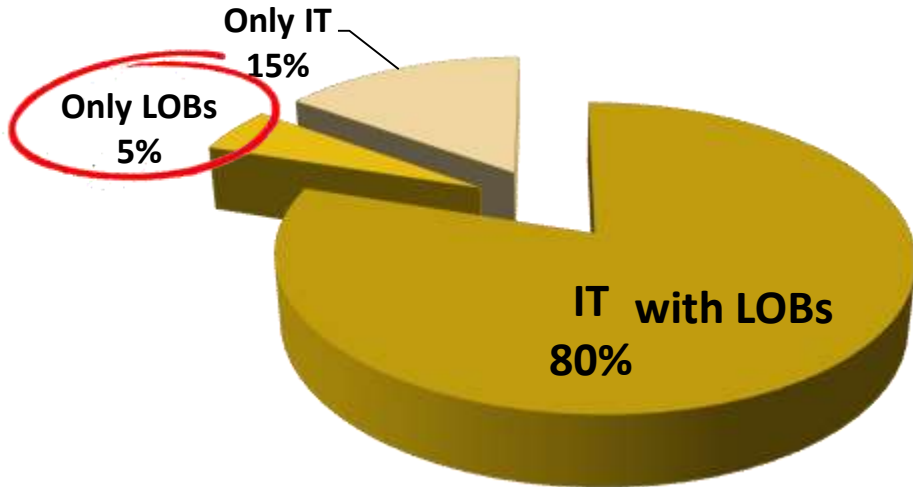
# Traditional IT



# New Boss of IT

Meet the new boss of IT – internal customers who pay

## Who's responsible for IT budget?



Source: STKI 2013

## Line of Businesses



# Traditional IT is bound to Change



I LOVE YOU,  
YOU'RE PERFECT,  
NOW CHANGE

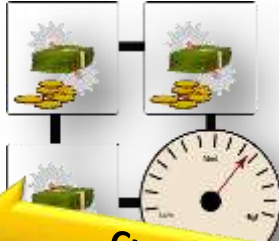


# IT Organization 2013

## Line of Businesses



## Pay per Use



## OCIO



## Software House



## Enterprise Procurement



## IT Delivery Services



## Managed Services

Customers' needs

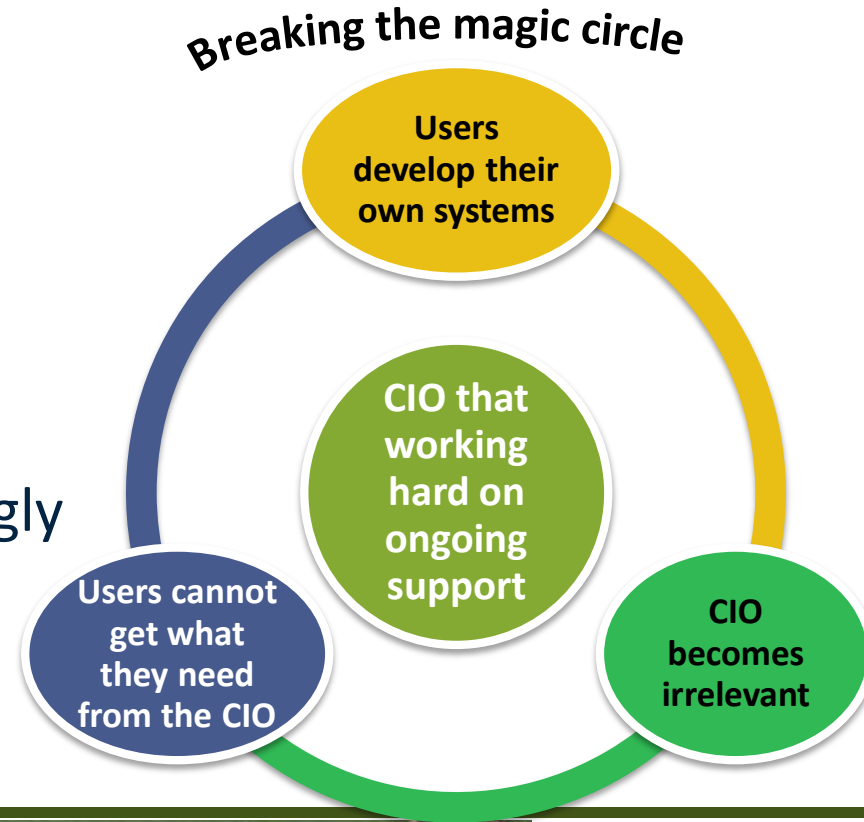
SOW

Bill of materials

Infra requirements

# CIO must become VP Tech Consultant

- Just like CFO or HR VP
- Support business **changes**
- Define technology **innovation**
- Sale IT products and services
- **Lead business** in an increasingly technological future with vision & strategic mindset





# New CIO/ VP Tech responsibilities:



## Strategic consulting

- innovation
- improvement

## Enterprise digital strategy

- new business models
- technology solutions

## IT technology/ solutions

- definition
- sales
- Implementation

## Delivery & ongoing support (Infra +Apps)

- cloud computing
- managed services
- IT chargeback



# Before

- Spend time worrying about who **controls the data**
- Focus on what you do
- Demand management
- **Align IT** to the business



# After

- Help users derive business **value** from it
- Focus on business outcome
- **Demand creation**
- Help define the company's vision and values

# OCIO Responsibilities

- IT strategy
- BRM (CEM)
- PPM – prioritization, PMO, SOW, implementation
- IT budget mngt
- Quality Assurance
- Measurement, control and reporting:
  - ▶ IT solutions usage
  - ▶ Ongoing support
- Sourcing decisions
  - ▶ Managed services
  - ▶ Cloud computing
- Vendor mngt
  - ▶ Contracts, agreements, SLAs
- IT chargeback



**From gatekeeper to conductor**



# OCIO Staffing Ratio

- Average size of Israeli OTC department: 3-7
  - ~3 % of IT staff (between 0.5% - 10%!)
    - Compared to ~7-14.6% in global orgs



OCIO department has doubled itself in recent years



# OCIO and LOBs

- CIO's execution arm
- Formal definition of SOW
- Menu of IT solutions, bill of materials, and SLAs
- IT technology sales management:
  - ▶ Synchronizing between what clients want and IT delivery can provide
  - ▶ Negotiation, advocacy, prioritization
  - ▶ Management and control of delivery services - QA
- Keep deals going and maintaining customer satisfaction



# But what exactly is IT going to sell?

- Flexible IT service catalog with different service levels at market competitive costs:
  - ▶ It's not about making money – keep price close to actual cost: labor, maintenance, procurement, etc.
  - ▶ Variety of tools available for determining the market rate
  - ▶ Sometimes is impossible to do full "apples to apples" comparison
  - ▶ However, this will force IT to justify higher-cost systems and applications

Very unlikely to get service catalog exactly right for the first time



# Open the “box”

- “Black box” IT may struggle to compete with free market competition
- Only by understanding the cost components of each IT service :
  - ▶ Better cost management
  - ▶ Clear picture for business decision-makers of how their actions affect IT costs and of how IT brings value to the business



# IT Chargeback is Not a New Idea – Cost Transparency Is

- Cloud computing effect:
  - ▶ Clear price list
  - ▶ Predictable billing
  - ▶ Pay only per use

IT customers would like to get from IT exactly the same





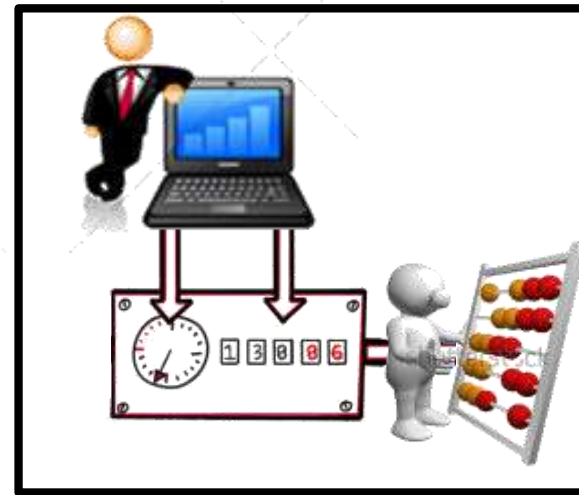
# Business Demand for IT Chargeback is Already HERE



**NOT IT time & costs allocation to internal customers!**



**NO more all inclusive IT!**



**Chargeback connected to actual consumption**



# Chargeback is important also for IT

- Investigate exceptionally expensive tools
  - ▶ Which apps cost more than the value they create?
- If business decision-makers will have a **clear picture** of how their actions affect IT costs and of the value IT brings to them – IT won't deal anymore with **budget cuts!**

Consume more - pay more



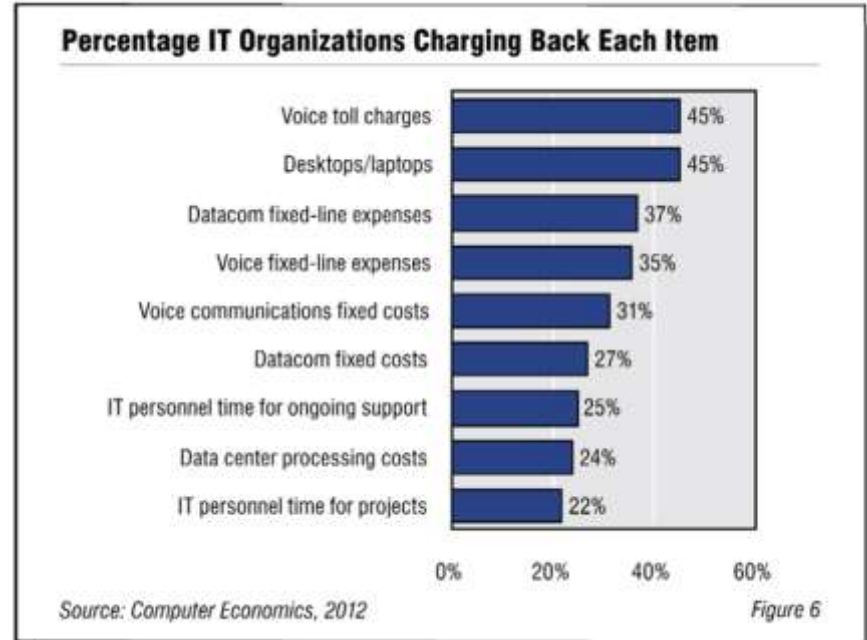
# IT Chargeback Challenges

- What are the correct parameters for shared services pricing and measurement (email, infrastructure, storage, backups, etc.)
  - ▶ Number of users
  - ▶ Usage
  - ▶ Critical service
  - ▶ Importance of LOB
- A perspective gap between the needs of one department and what's right for the organization as a whole:
  - ▶ Short term project or purchase decisions can be ineffective in organizational perspective



# IT Chargeback Trends

- Despite its importance, there is still no actual chargeback in Israel
- Best in class ITOs are just at the beginning of showing back expenses:
  - ▶ Business gained sense of true partnership
  - ▶ LOB received opportunity to provide feedback
  - ▶ War on budgets ends



# IT Financial Management Solution Vendors in Israel

- Emerging solutions that pull data from various systems into a single repository
  - ▶ Forecasting
  - ▶ Budgeting
  - ▶ Benchmarking
  - ▶ Statements producing that show IT consumers how much they are being charged for IT services and why



*In alphabetical order*



# IT Measurement

- Managing IT as a black box allows IT to be unmeasured according to business KPIs - the only (!) department among all LOBs
- Last year ITOs started arranging this persistent untreated area
- IT measurement & control – translate technical metric into credible measures of value to make informed decisions



How effective is my IT?

Need to show economic feasibility



# IT Performance KPIs

## Manpower efficiency

- Staffing ratios

## Operational efficiency

- Direct: Increase in productivity
- Indirect: saving in physical space, equipment, workstations, storage, paper, mail, overhead, etc.

## Finance

- ROI or financial benefits from the new system or functionality to revenues growth

## Customer satisfaction

- Quality, subjective KPI that often doesn't reflect the reality, but gives understanding of the perceived value of IT



# IT Performance KPIs Examples

## Manpower efficiency

- Benchmarks

## Operational efficiency

- Service Desk Efficiency
- IT Systems usage analysis
- Systems down-time

## Finance

- IT Spending as % of Revenue
- Capex VS Opex
- IT Capital/ Operational Budget Change from Last Year
- Personnel as % of IT Operational Spending

## Customer satisfaction

- User satisfaction surveys
- % of IT services delivered according to SLAs
- Projects delivered on time/ budget/ clients expectations





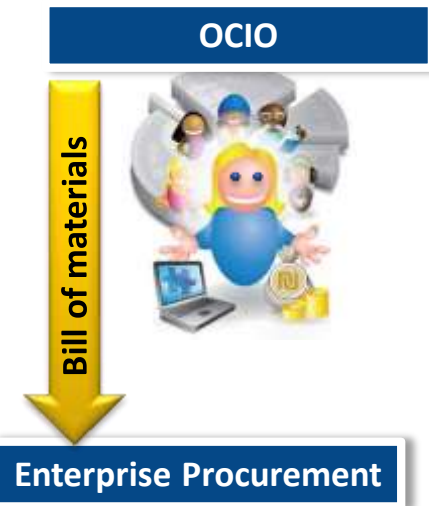
# Communicate the value your create

- It's a good thing to create value for your business
  - ▶ Share the good news with all IT's key stakeholders
  - ▶ IT Newspaper



# OCIO and Procurement

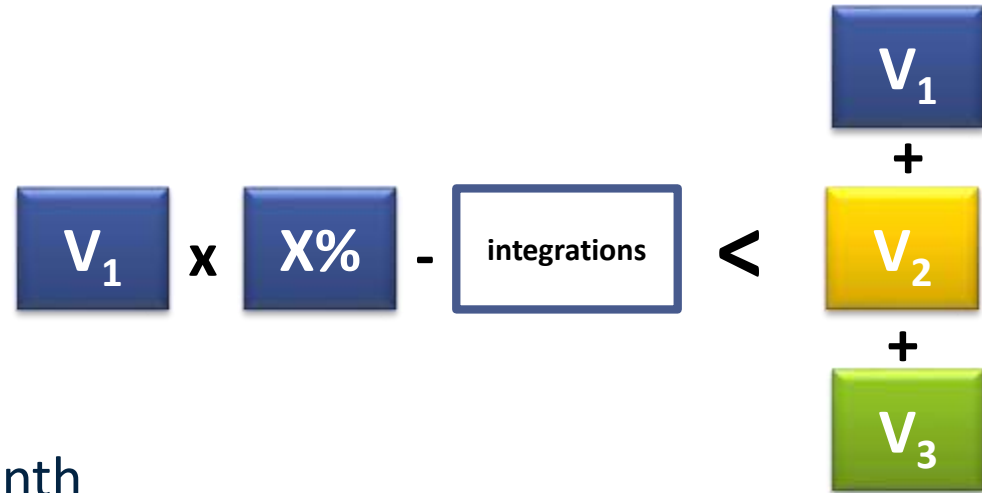
- **Bill of materials:** HW, SW, services
- IT contract shouldn't be treated **only** from **legal or procurement perspective!**
  - ▶ If price is the only differentiator – vendor is a commodity with short-term relationship
- Precise definition of **SOW**
  - ▶ How risky is the project/ procurement?
  - ▶ Does the period of contract exceed 18 months?



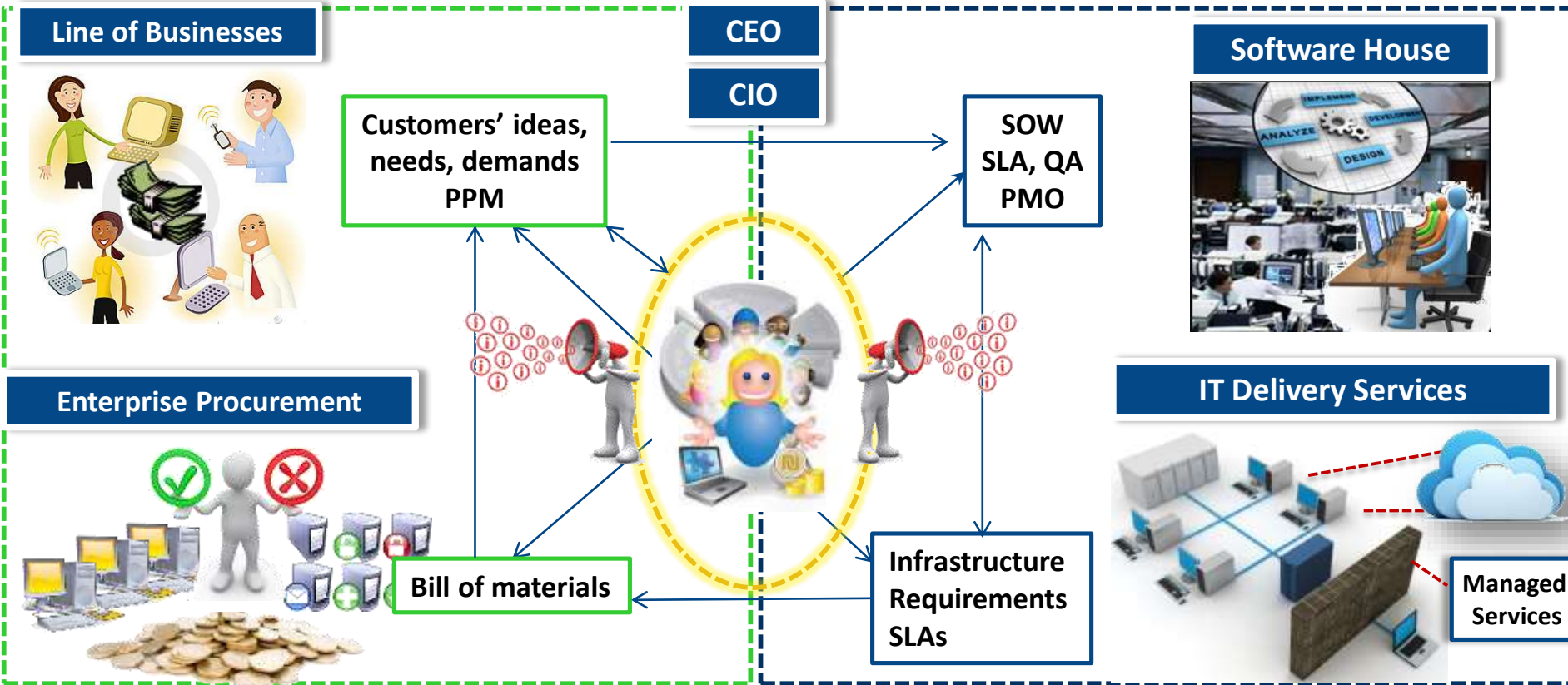
# Vendor Management

Hundreds of vendors:

- Everyone makes a profit
- Enormous **cost of selling**
  - ▶ every tender – 5% of project
- **Management attention:**
  - ▶ 800 vendors x 15 min = 1.5 month



# OCIO and IT Delivery (SW and HW)



# IT Delivery as a Cloud Provider

Zero capital model

Can you operate as a private cloud provider for your organization?

- Next year
1. Run the business
  2. Capital investment

Line of Businesses



Elastic

On-Demand

Usage Metered

Self-Service Access

Saving

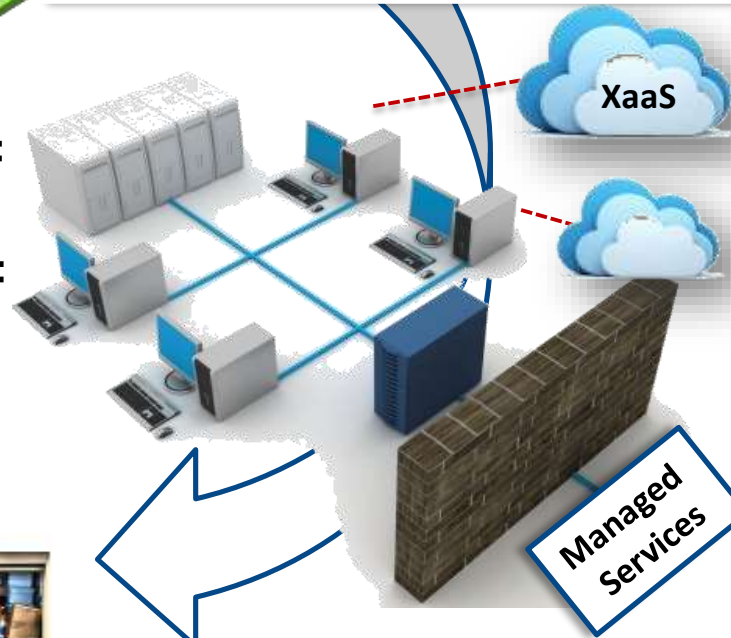
Money

Time

Space



IT Delivery Services (SW + HW)



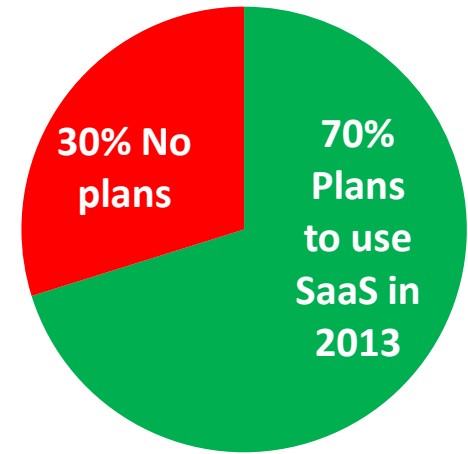
Managed Services

The money you charged for IT delivery this year

# Make-or-break Year For Cloud In The Enterprise

- You can't do it, if you're not connected to cloud services yourself:
  - ▶ Greater business **agility**
  - ▶ **OPEX reductions**
  - ▶ **Speed of deployment** and ease of customization
  - ▶ **No purchasing**, storing, installing or and maintaining SW and HW
  - ▶ Easier monitoring of software licenses
  - ▶ **Automatic upgrades** with no extra time or monetary investment required
  - ▶ **Minimal training** and "hand holding" required

Most Israeli organizations  
plan to start using SaaS  
in 2013



Source: STKI Survey 2013

# Cloud Computing is Not Just Pressing a Switch

- Together with simplifying some aspects of IT – CIO will manage more complex, hybrid environment:
  - ▶ Cloud services, internal IT and old legacy apps
  - ▶ Data integrity, security, data integration across multiple services
- Outsourcing providers are needed!
  - ▶ **Utility providers** – efficiency and cost
  - ▶ **BPO providers** – HR, customer support – apps and services at scale
  - ▶ **Orchestrators** – trusted broker with deeper operational experience across all business processes and technology solutions



# Mitigating risk and liability

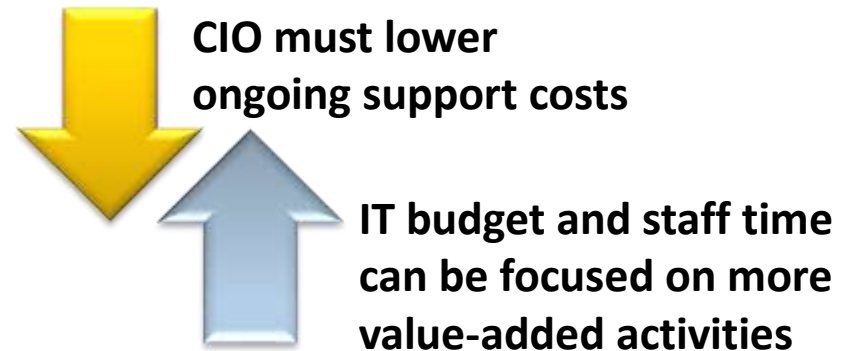
- Plan hybrid IT architecture that provides both agility and security
- Ask to see the financial statements, visit references, require SLA
- Make sure that security, auditing and access are controlled by ITO
- Invest in separation agreements
  - ▶ What happens when a provider doesn't comply with SLA and holds your data as hostage?



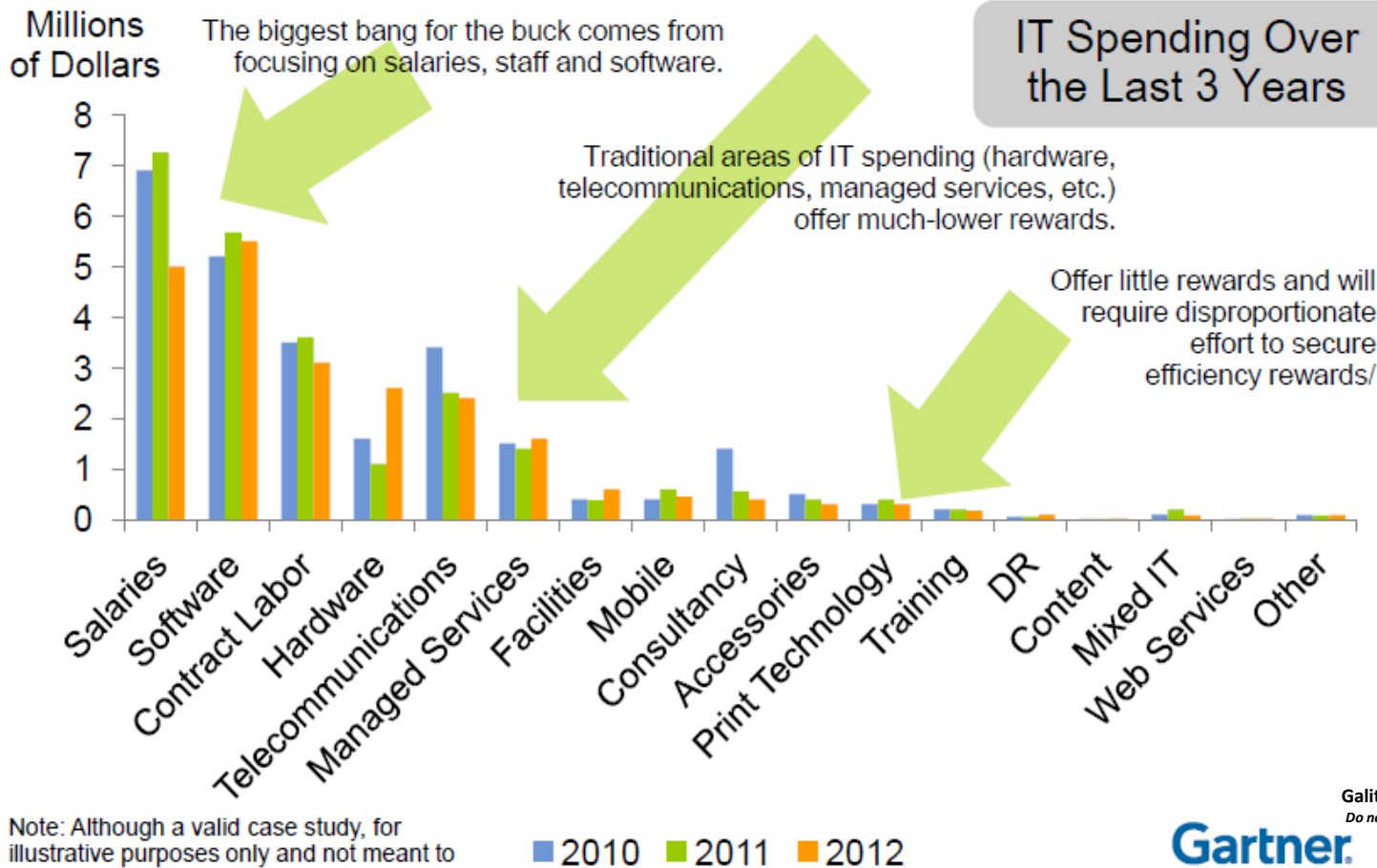


# IT Delivery Optimization & Ongoing Support Costs Decrease

1. Understand the IT Cost and Staffing Structure
2. Leverage the Cloud
3. Enlarge and Elevate the Role of IT – Integration, Intelligence, Innovation



# Biggest Opportunities for IT Budget Reduction



Note: Although a valid case study, for illustrative purposes only and not meant to be a goal for an individual enterprise

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# PPM Maturity Model



## 4. Strategic

Customer experience mng, business enabler, integrated tools with business, benefits realization tracked

## 3. Controlled PPM

Prioritized demand mng aligned to business goals, resource & budget mng and transparency

## 2. Emerging

PPM practices in place, processes automation, staff allocation, central budget mng

## 1. Traditional

PMO in place, single project mngt, no tools, no cost/ benefits analysis

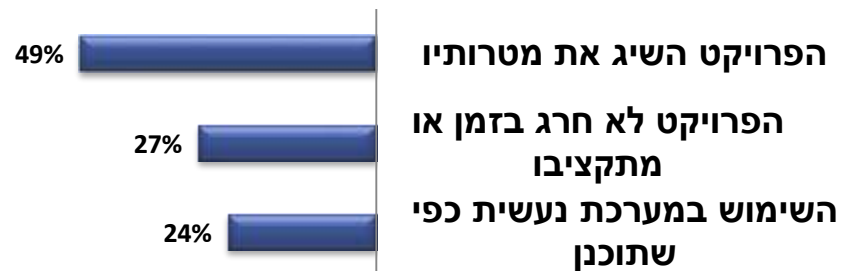
# Project Success

- Who's in charge of fully understanding the project's **scope of work**?
- Do you have project contract agreed by both sides?
- If not – how do you know what is in scope and what are additional requests
- Do you circle back after project completion to make sure that project outcomes deliver the value laid out in initial justification?



# Project Success Measurement

## מתי פרויקט זנחשב לפרויקט מוצלח?



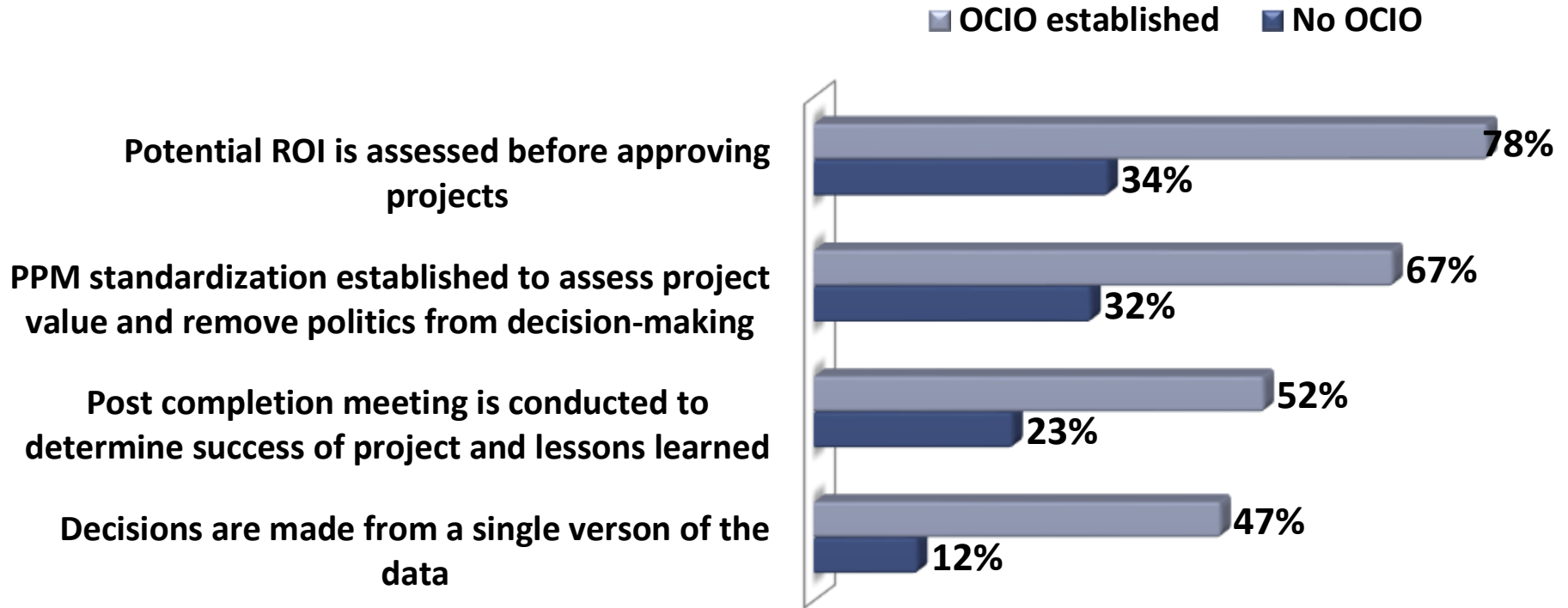
## מהם הסיכונים הנמדדים של פרויקטי IT?



Source: STKI 2013



# OCIO? It works!



*Source: STKI Survey 2013*



# It's not about the tool, but it cannot succeed without it

Full PPM solution

33%

PPM solution exists but lacks some functionality

31%

In the middle of implementation or tool examination

13%

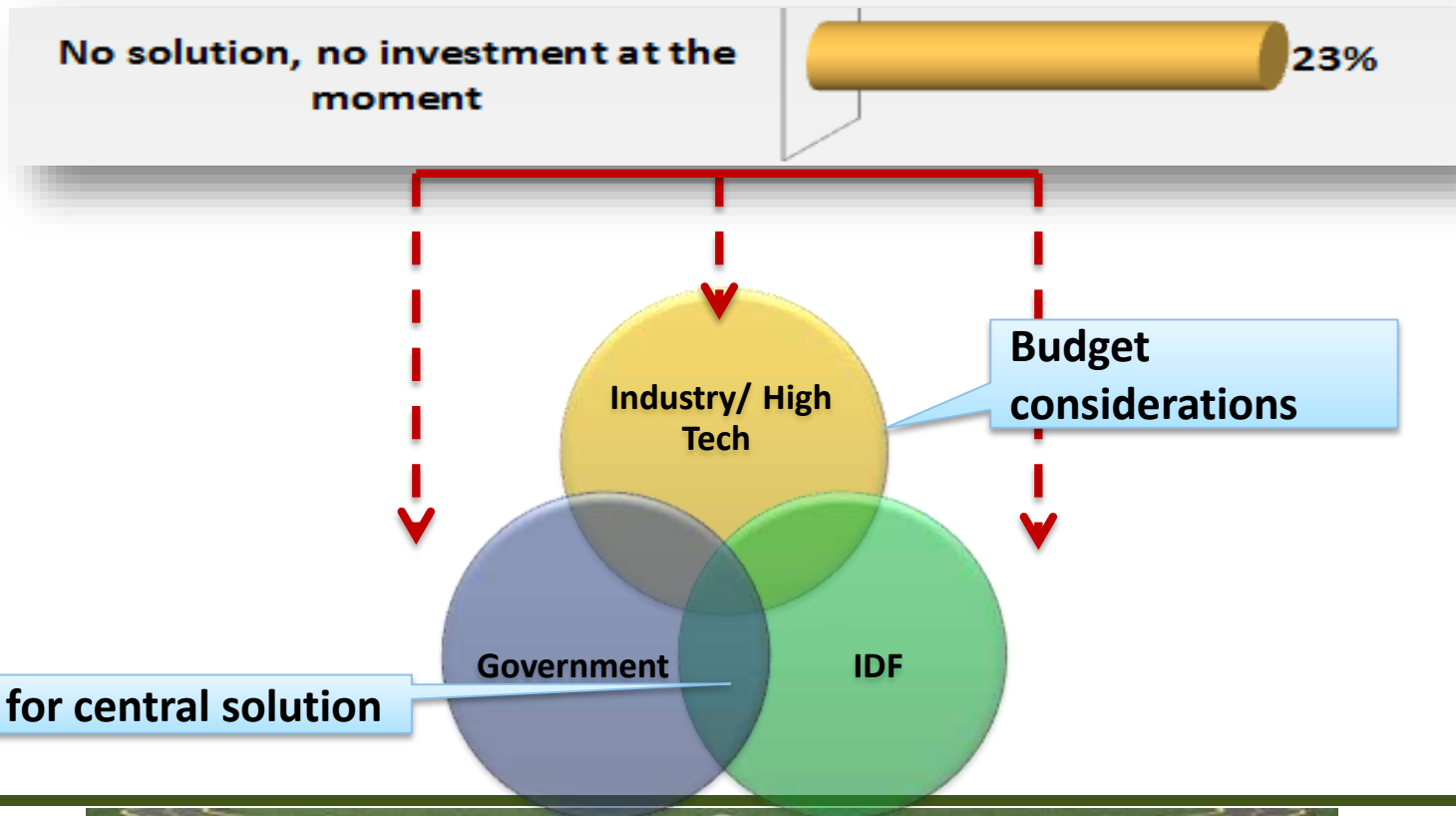
No solution, no investment at the moment

23%

*Source: STKI Survey 2013*

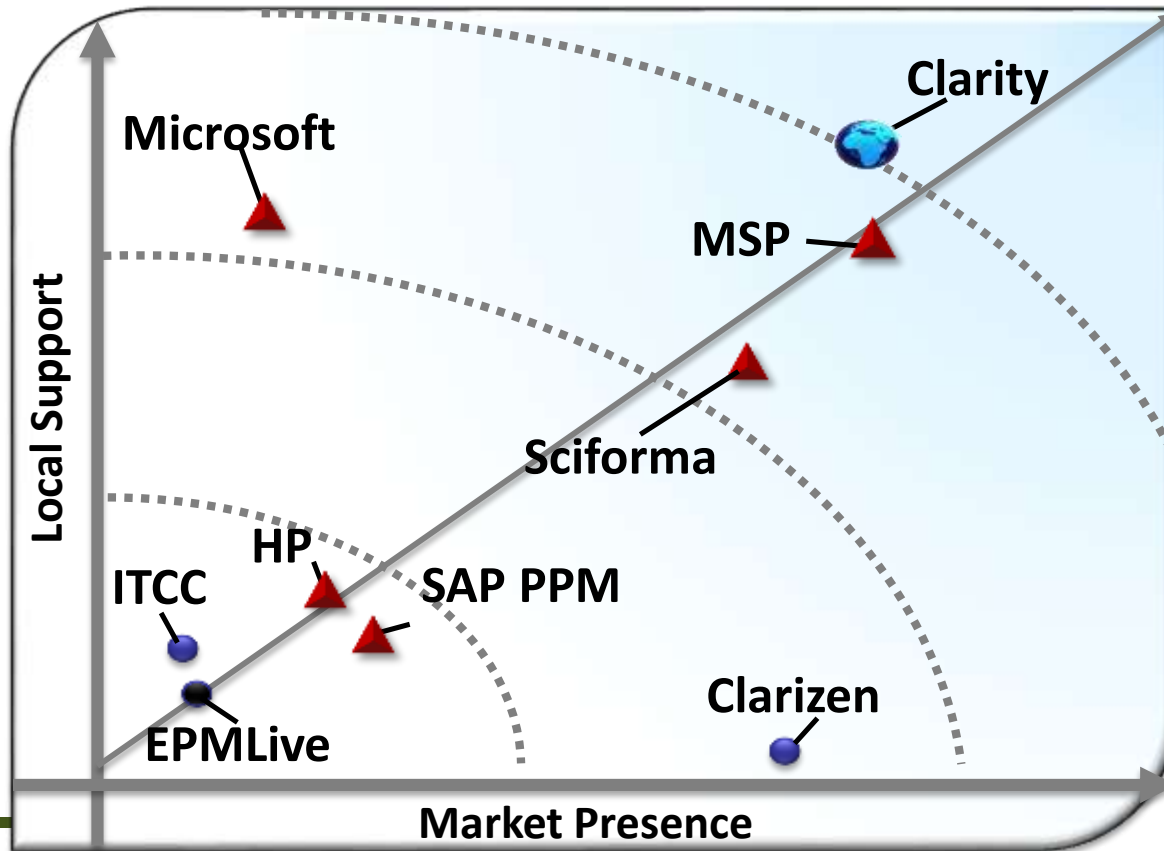


# Three industries are not there yet





# PPM Tools - Positioning of the Israeli Market



# PPM Tools & Integrators in Israel

	<b>Clients</b>	<b>New Clients 12'</b>	<b>Integrators</b>
<b>Clarity (CA)</b>	Ministry of Tourism, Clalit, SanDisk, Leumi Card, Harel, Jewish Agency, Strauss, Bank Leumi, Orange	Pelephone, Bank Mizrachi, Playtech, Bank Hadoar	Proceed
	Teva		CA
		Playtech	Orantech
<b>MSP</b>	Menora, IAI, Ayalon-ins, Cellcom, Phoenix, Leumit, Justice Department, Clal Bit, Bank Igud, Delek, Paz, YES, Min.of the Environment , Visa CAL, BDO <u>CIO Dashboard: Random Logic, IDF, Elbit. iTeam</u> (budget planning)	Bank Discount, Migdal, MOD, Prime Minister's Office	ONE1
<b>Sciforma</b>	Bank Discount, Menora, Teva, Visa Cal, BVR, Nova, Evogene, Leadcom Hazera Genetics, Bid Band Networks, IDE, Veraz, Opgal, Teva Tech, HOT, ZIM, Isracard, Machteshim agan eng, Intel ISDC, Plasson Given Imaging	ICL, Solaredge, Teva API CM	Xioma Signifer, Aman

# PPM Tools & Integrators in Israel

	<b>Clients</b>	<b>New Clients 12'</b>	<b>Integrators</b>
<b>EPM (Microsoft)</b>	M-system, Leumit, IAI, IAA, Lotem, Bezeq, Mekorot, Orbotech, Bank Leumi, Coca-Cola, Nice, <u>Matan</u> : Machtshim Agan, Prime Minister, Maccabi, Alvarion, IAA, Better Place, Tnuva, Random Logic; <u>Orantech</u> : Netafim, ECI, Ceragon, Logic, AD Gency ,Sol gel ,Rocar ,Playtech, Sandisk; KAKAL, MODU, Kodak, RAD; <u>PZ Projects</u> : Min. of Foreign Affers; Proceed: Malam	MS 2010 Amdocs, Defense <u>Matan</u> : Strauss, Tel-Aviv Municip. Elta, Marvell <u>Orantech</u> : Navy, Shabas, Teva R&D, Sorek, Leumi Le'Mashcantaot <u>PZ Projects</u> : Justice Department, Elisra	Matan, Orantech, PZ Projects
<b>SAP PPM</b>		IEC	SAP, other potential SAP integrators
<b>PPM (HP)</b>	Mataf, Motorola(Global), LivePerson		HP, BDA

# PPM Tools & Integrators in Israel

	Clients	New Clients 12'	Integrators
<b>Approach PPM</b> on Force.com	Netafim		Approach, Salesforce.com
<b>Clarizen</b>	Tnuva	SMBs	Clarizen
<b>Compuware Changepoint</b>	Jacada (Global), Retalix (Global)		Matrix
<b>ITCC</b>		ECI, Tama, Metro Motor	that's IT
<b>EPMLive</b>			Methoda

# Open System PPM Systems

OS PPM SW	Web Site
OpenPPM	openppm.sourceforge.net
Clarizen	clarizen.com
PPM Central	metier.com
AtTask	attask.com

*More info on Project mnqt: [http://en.wikipedia.org/wiki/Comparison\\_of\\_project-management\\_software](http://en.wikipedia.org/wiki/Comparison_of_project-management_software)*





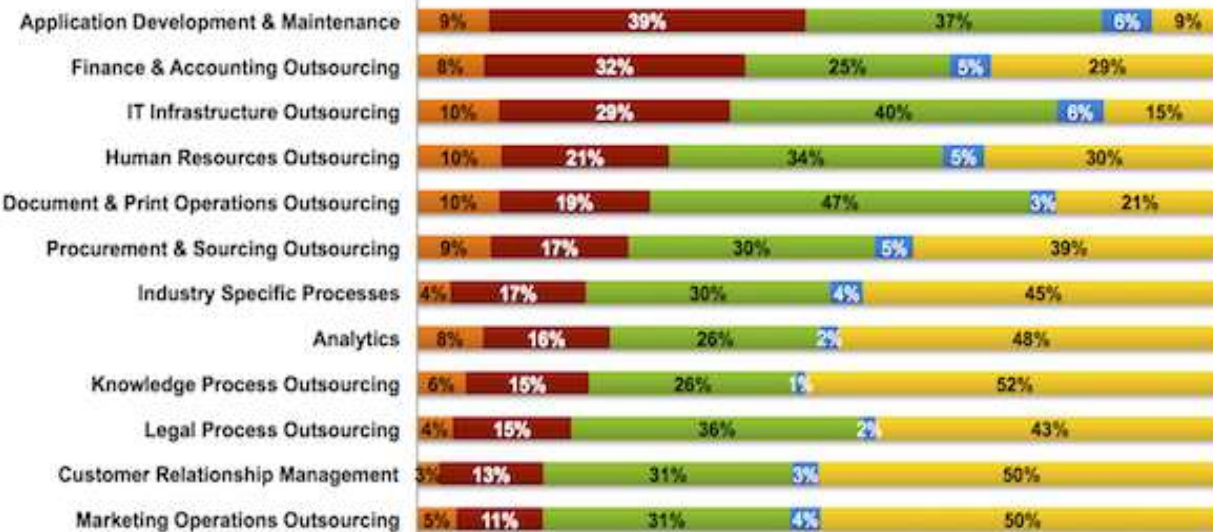
OUTSOURCING

Transformation Outsourcing

# Plans to Outsource in 2013

Q. Are you likely to increase or decrease your outsourcing activity across the following areas in the next 12 months?

■ Start for first time ■ Increase scope ■ Stay the same ■ Decrease scope ■ No plans to outsource



Source: HFS Research 2013, n = 399 Buy-side Enterprises  
 "2013 State of Outsourcing" Study, conducted with the support of KPMG

• Although 2012 was pretty dire for the WW outsourcing, it's planned to be more embedded than ever in IT strategy

- ▶ 50% looking to *increase* application services
- ▶ 40% - finance and accounting; infra
- ▶ 30% - HR



# ITOs expecting a whole new level of contribution by sourcing

The year 2000 is displayed in a red, digital-style font inside a white circle, which is itself inside a white square box.

Same goals for 7-  
years agreement

- Cost reduction and focus on core business

The year 2013 is displayed in a red, 3D-style font with colorful confetti around it, inside a white square box.

Continually increasing  
contributions to the  
business

- Business process effectiveness and transformation

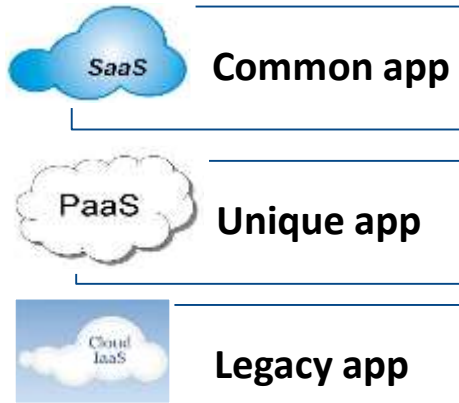




# Cloud and Outsourcing – not the same!



- Not a business differentiator
- Common, high volume requests
- **Niche, separate from business**



- **DC transformation**
- **Big projects**
  - ▶ Complex SW delivery



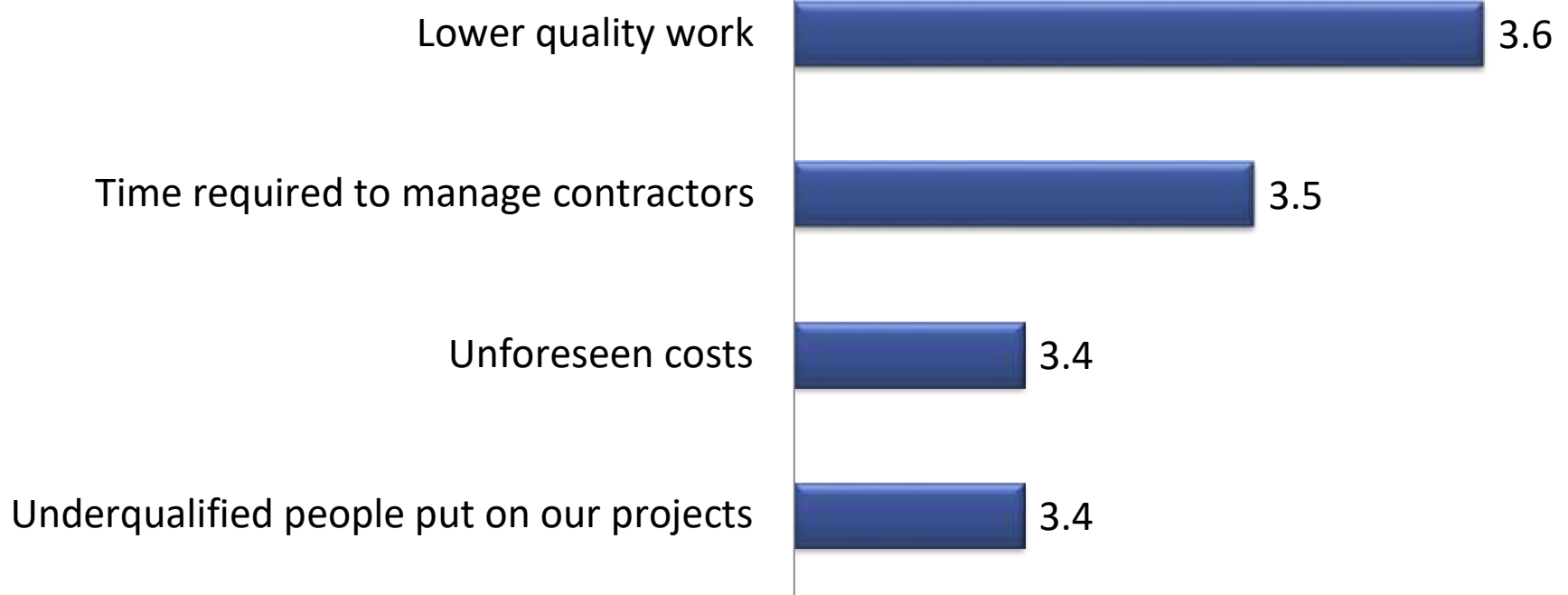
# Outsourcing Trends

- Low-cost cloud services will cannibalize outsourcing players' revenue
- IT outsourcers that not investing enough in cloud value-added services will disappear through merger and acquisition
- Outsourcing providers will shift to services "sourced from the Net" and paid on the outcome, not on an employment basis



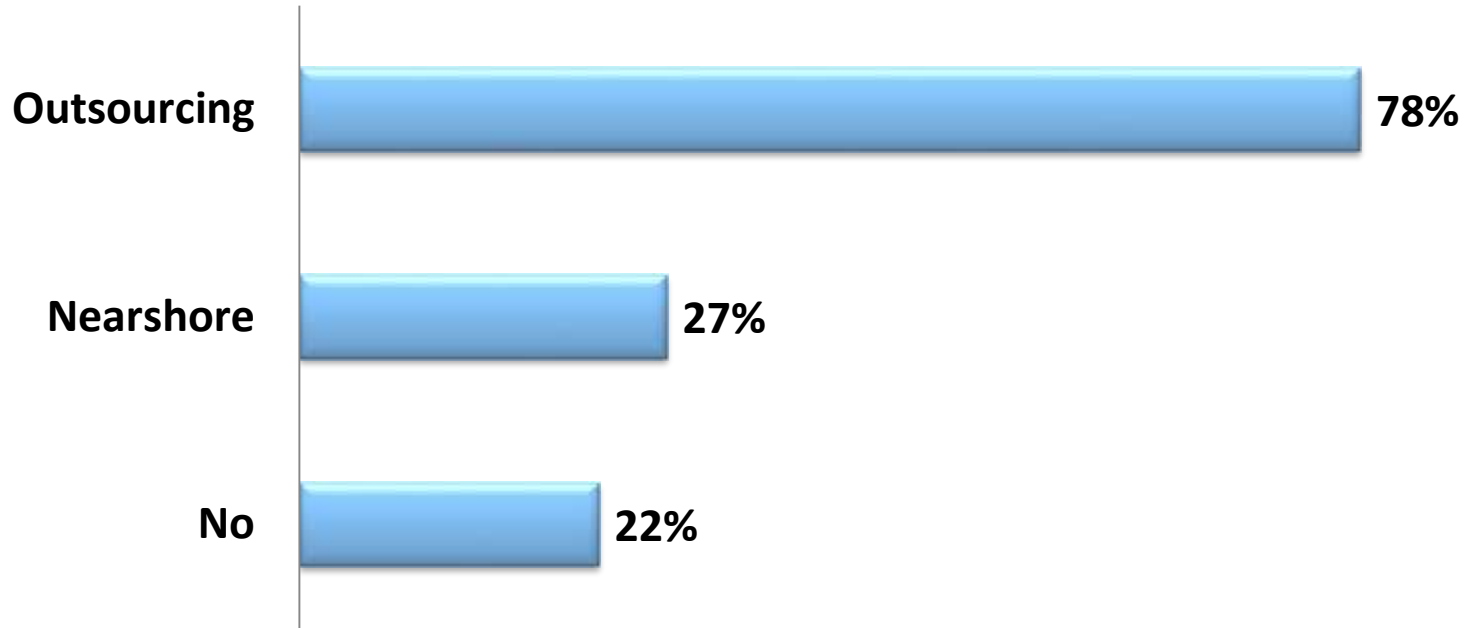
# Sourcing Concerns

*Please use a scale of 1 to 5, where 1 is "not a concern" and 5 is "it's a primary concern."*



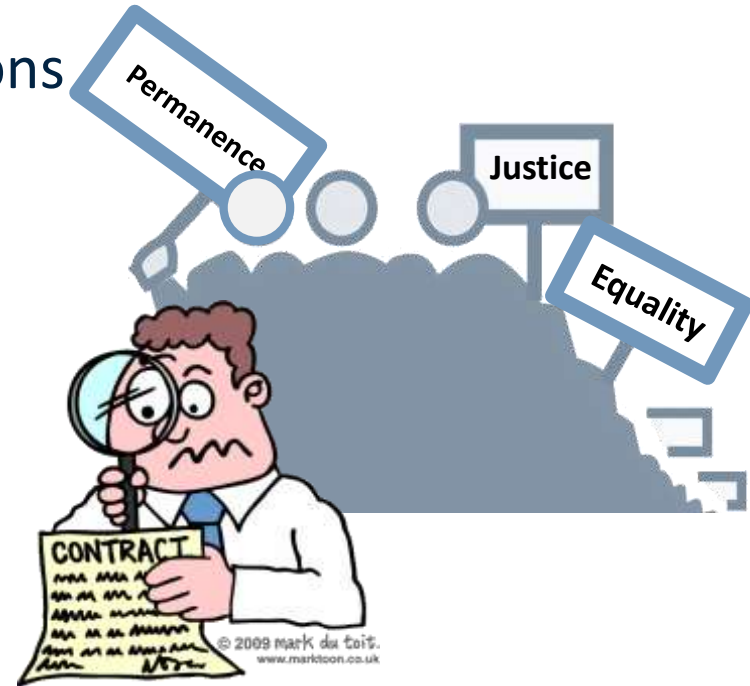
# Use of Outsourced IT Services in Israel

*Does your company use outsourced IT services? (This could include staffing, support, development, management, etc.)*



# Staff Augmentation Trends

- 2012 was a year of contract workers reassessment:
  - ▶ Crises in employer - employee relations
  - ▶ Stricter regulations
  - ▶ Demand for opex reduction
  - ▶ Hashkal
- Backsourcing, contracts re-opened and recruiting again



# Operational Temps Pendulum

Upswing - Hiring temps



Ready to pay premium for flexibility



Downturn –  
Re-negotiation contracts/Big discounts



Poor quality/ Layoffs



Need for flexibility



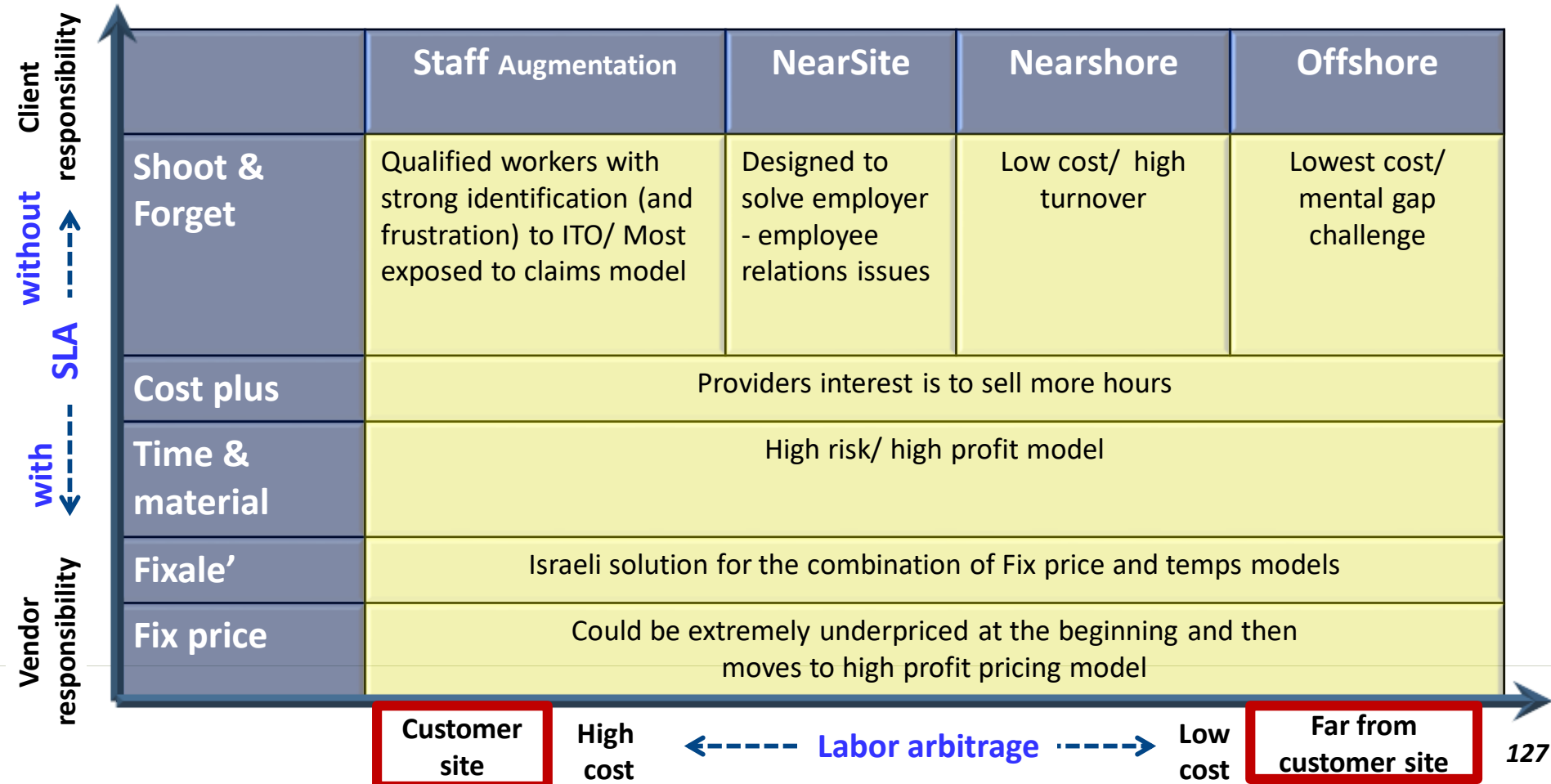
Hiring temps



Assessment problem of  
Operational temps quality work



# New Models Flood



# Choosing a Contract Type

Source: ComputerEconomics

SOW is well defined and  
has low procurement risk

Fixed-price contract

Specifications are vague  
change in requirements

Cost plus

Project needs flexibility

Time and Materials  
Contracts





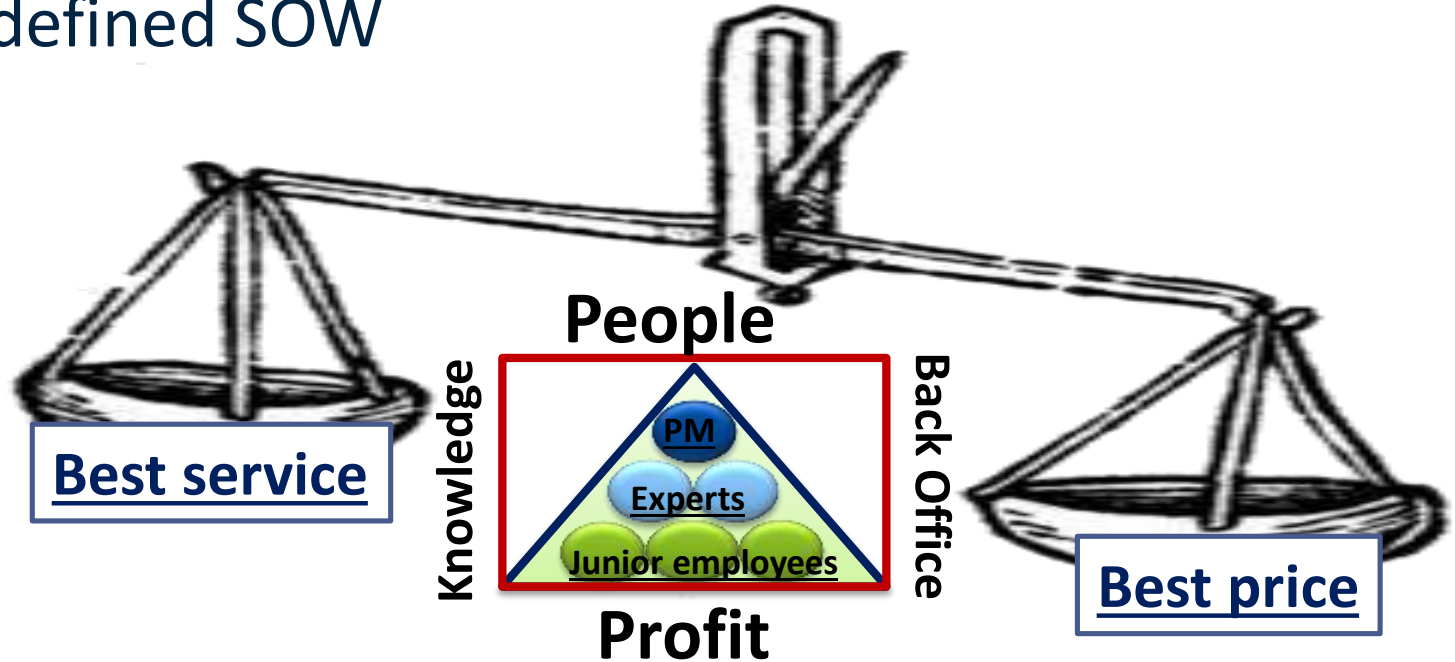
# Managed Services

- Small, manageable packages of work:
  - ▶ different packages priced at different levels
- Specific IT operations with service provider responsibility:
  - ▶ security, patches, backups, networks and apps
- Decide what you want the service provider to take care of, and what you want to handle yourself



# Managed Services

- Fix price with a variable component
- Well defined SOW
- SLA



# Before

# Today



# Outsourcing



## First outsourcing models

Single-sourced  
fixed-price, all-inclusive  
resource controlling  
limiting flexibility  
even increasing costs

## Multi-vendor sourcing

Difficult to manage  
no single view of  
processes  
no consistent SLA  
escalating mngt costs

## Cloud-based outsourcing

Outcome focused  
usage-based  
location agnostic  
virtual services  
Flexible and scaling

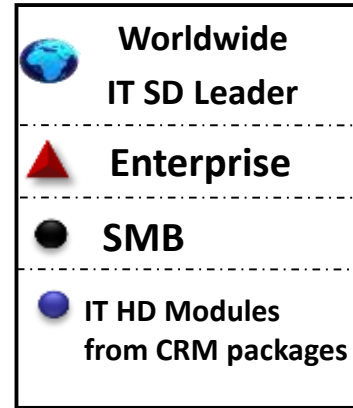
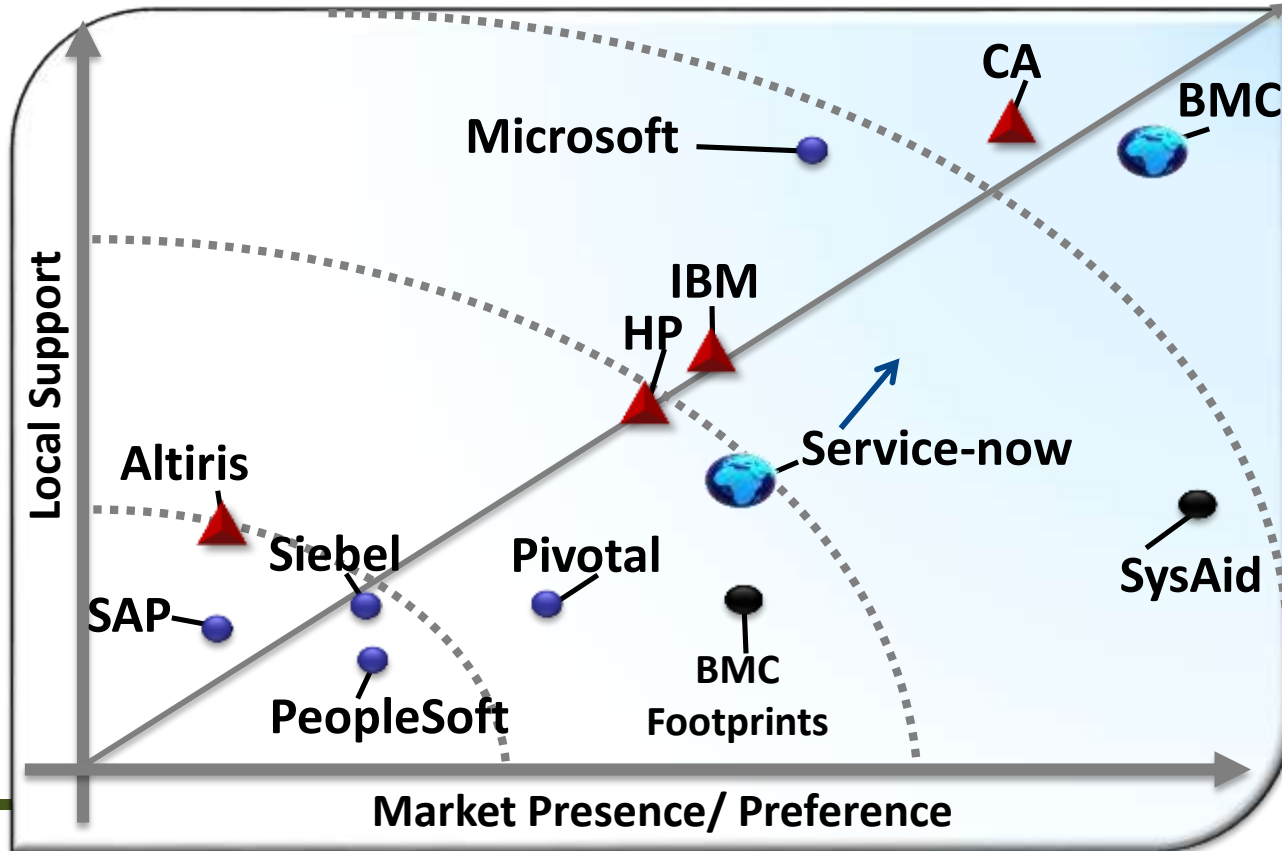


# IT Service Desk Trends

- Clients become more savvy (Gen-Y): incidents' complexity increase
- Self-service: users prefer using blogs, vendor and user online support sites, and social networks to find answers instead of using service IT HD
- Mobile devices need attention: ~20% HD calls rise
- ITSM tools: Service catalog and cost mngt, first IT service desk SaaS enterprise solutions



# IT Service Desk – Positioning of the Israeli Market 2013



# IT Service Desk Tools & Integrators in Israel

	Clients	New Clients 12'	Integrators
<b>CA</b> Service Desk Manager	Bank Discount, Elta, ECI, HOT, Teva, Elbit, Osem, Mekorot, DSW, Bezeq Int, Beit Berl, Israel Police, Tnuva, Central Bureau of Statistics, EL-AL, Tamas, TASE, Ministry of Health, Tel-Aviv Municipality, Herzelia Munic. Clalbit, Shabas, Rafael, Isracard, 888, 9900, Bank Hapoalim, Mifal Hapais, Ministry of Justice, Ministry of Defense, Yediot, Petah-Tikva Munic, Bank Israel, Ministry of Immigration, RASHAT, Teva (Bar), Brom, Lotem, Ness (SaaS), Haaretz, Phoenix, Bank Yahav	Clalit, Yahlam Service catalog: Mekorot, Elbit	CA, Ness, Malam -Team, Techmind
<b>BMC</b> Remedy	Zim, Malan, IGS, MED Nautilus, Malam, Kneset, NDS, Social Insurance, Uniliver, Creo, Intel, Motorola, Summit Design, Polycom, Cellcom- eng. HOT-eng. Partner – eng, Sandisk, Comverse, Nice, IAI, Better Place, Migdal, SCD, 012 - eng., Texas Instrum , Netvision eng.	Amdocs, Frontline, SCD, Bezeq, IEC	Matrix
<b>BMC</b> Footprints	ביטוח איילון, עיריית ירושלים ומנועי בית שמש , Calmobile SIVA Sintech media		Omnitech

# IT Service Desk Tools & Integrators in Israel

	Clients	New Clients 12'	Integrators
<b>ServiceNow</b>		Partner, Netafim, Melanox, Ness IT	Ness, Dicomano
<b>HP</b>	HPOV:IDF, Netafim, Shaam, Open University, Orbotech, Tower Semiconductors, Haaretz; Service Manager: NDS, PlayTech, Shupersal Tefensoft: Menora, Prime Minister, Hadasa, Machteshim, Maman, AudioCodes	–	Aman, HP
<b>IBM</b> TSRM	Harel, Menora, Bahai World Center, Edgar Real-estate, Natgaz	Ministry of Health	IBM, Addon, Ludan
<b>Altiris</b> Symantec	Callmobile, IDF	Ormat	Aman, Bynet, Netcom, GlassHouse





# IT Service Desk Tools & Integrators in Israel

	Clients	New Clients 12'	Integrators
<b>SysAid</b>	<p>(300 Israeli clients)</p> <p>Jonson &amp; Jonson, Highway 6, Omrix, Wintegra, Sami Shimon College, Africa Israel, Mei-Eden, AIG, Electra, McCann Erickson, Diesenhaus unitours, Opal , Flash Networks, Liveperson, Hertz, Psagot Ofek, Coca Cola, Beit Barel College, Ashdod Port, Technion, Shila, Sugat, Gadot, Bezeq Int. AeroScout, Strauss, IKEA, Delek, Tempo, 013 Netvision, Tami4 ,Bank of Jerusalem Leumi Mortgage , Bituach Yeshir, Holmes Place, Ashot Ashkelon, Netformx, Fishman, Hospital-Nahariya, halman aldubi, Eged Tour, Zoglobek, Madanes, Tempo, Beeri print, Lubensky, Shlomo Sixt, Excellence, Elul, Ophir optronics, Realcommerce, Nextcom, Fritz, LR Group, Israel Ports, Magicsoftware, Cal auto, West galilee collage, Maabarot Products, Haifa Port, PharmUp, Lageen, ICQ, Logic, Tambur, Kamada, The Nation Traffic, Elcam, Carmel container systems, Brightsourceenergy, Kavim, Gitam BBDO, Rishon Lezion Muni, Dania sibos, Baran group, Tower Semiconductors, Bee Group, Betterplace, Keshet TV, Leumi Card, FedEx, WIX, Optier, Tahal, TGS, Palram, Sapience, Orca, UPS, Beeper, Intel labs, Mivtach Saimon, Albar, EMC, Tel-o-Fun, Dash, EL-AL Sec, Sapir collage, Diplomat, Hulon Muni, Shlomo Insu, conduit, Hadssa hospital , Tradenetworks, Ceragon, Rokar, Celtro, National library, IDC, Nova, Ambar, Mediamind, UTI, Barzilay Hospital, Afimilk, David Intercontinental, Hertz, Isrotel, IKEA, IMsoft, Tmura, polymerlogistics, shastovich, , Imperva, Haifa university, mashcal, Tel-hai collage, IBI, D&amp;B, Opgal, Madanes Insu Shlomo Sixt, Caesar stone ,Magic Cal auto West galilee collage Lageen Logic, Motorola ,Safe city, Gitam, BBDO Danya-cebus Tower Semiconductor Tcpoit Keshet TV, FedEx WIX - Fibernet, Sapir collage Albar Intel Labs Dash El-Al Sec Div Diplomat Holon Muni Rokar Tiny love IDC NOVA IMDsoft Tmura The Council for Higher Education Imperva Netformx Ashot Ashkelon Eged Tour Environmental Services Company Ltd. (ESC) Shirbit, and many more</p>	<p>עשות , Netformx  TOWER JAZZ, אשקלון,  אגד, DELEK IT, semiconductor  תיור, ESC LOGIC, שירביט,  מוטורולה – רכבת, תדיראן,  אלטשולר שחם, יגאל ארנון, ימין  אורד, אינטל פתח תקווה,  ויסוצקי, ajah, מילגם, Techjet  ברמד, ריסקו, קבוצת עזריאלי,  מעלה אדומים, Solaredge  אוברסיז, MER שופרסל, מימון  ישיר, רינהולד כהן ושות',  אוניברסיטת בן גוריון, פלסאן,  Tradency גלעם, אינקרדימיל,  מדינול, דקסל, נמל חיפה 2,  JCT, HSBC, הכשרה ביטוח ,  Retalix, נירלט, המכללה למנהל,  James Richardson , McKesson  ORIAN , מגה, סופר פארם</p>	<p>Consist</p>

# IT Help Desk Modules from CRM packages

	Clients	New Clients 12'	Integrators
<b>Microsoft CRM</b>	Ministry of Finance, Israeli Navy, Intel, Prime Minister, Eldan Advantech: Eged, Shikunbinui, Amidar, Volcani Center, Lavi EL AD: Judicial Authority, Ministry of Transportation, Court Malam-Team: TAU Guardian: Baad15, Jewish agency Matrix-Effect: Igud, Malan, Cellcom, Visa Cal, Machteshim-Agan, Marlboro, Ministry of Education Almog: Telmap Ministry of Health, Shikun & Binui, TOTO, Osem, College of Management	Prodware: Shaam, Tax Authority; Malam-Team: Mevaker Hamedina, Kfar-Saba municip, Ashdod municip; E4D: YES	20 Partners, including: Matrix-Effect, SIT, Advantech, Malam-Team, Prodware, E4D, Bynet SW, Yael, El-AD....
<b>Pivotal</b>	Bat-Yam Municipality, Exlibris, Systematics, Panorama, Telmap, Ericom,FGG Radvision, Gilat, Shahal, Ritalix, Globos, Tadiran, Orad, Maccabi, Negev Ceramics		ONE1
<b>SAP</b>	Paz, Isr. Government, Bazan, Bank Hapoalim (modul)	-	Ness, Taldor, Advantech, Value plus
<b>PeopleSoft</b>	Ministry of Foreign Affairs, Mamram, Bezeq	-	Matrix
<b>Siebel</b>	Tnuva, Golden Pages, Bank Leumi		Taldor, IBM
<b>SalesForce</b>	Yad Hanadiv		Service Wise

# ITSM SaaS Israeli Market 2013

Vendor	Product	Target Market
BMC	BMC Remedy OnDemand	Enterprise and service providers
	BMC Remedyforce Service Desk	All markets
CA	CA Service Desk Manager	All markets inc. service providers
HP	HP Service Anywhere	Mid-to-Large enterises
IBM	IBM SmartCloud Control Desk	Enterprise and service providers
ServiceNow	ServiceNow	All markets
SysAid	SysAid Cloud Edition	SMB

[http://blogs.forrester.com/category/service\\_desk](http://blogs.forrester.com/category/service_desk)



# Open Source Help Desk Software

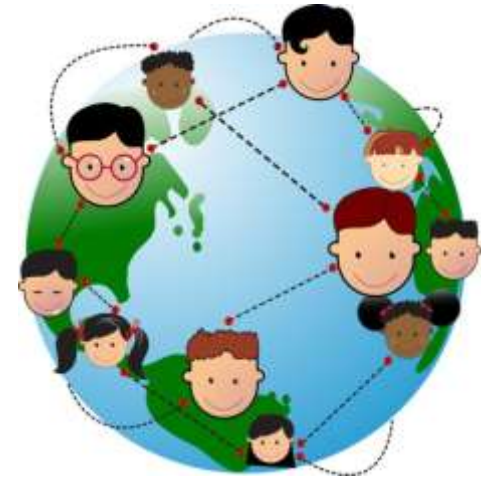
OS HD SW	Web Site
RT: Request Tracker	bestpractical.com/rt
Help Desk Software	freehelpdesk.org
OTRS	www.otrs.com
Triage	code.google.com/p/triage
PHP Help Desk	www.p-hd.com.ar/eng/index.php
GLPI	www.glpi-project.org
SIT!	sitracker.org

*[More info: http://www.opensourcehelpdesklst.com/](http://www.opensourcehelpdesklst.com/)*



# Summary

- Your customers and employees are **SOCIAL, MOBILE** and live on **CLOUD**
- **Lead, follow or get out of the way**



# Complex Hybrid Apps

39%

of developers spend time  
developing the same app/feature  
for multiple platforms



Thank you!

