

# SHARE 2002 Strategic Concerns

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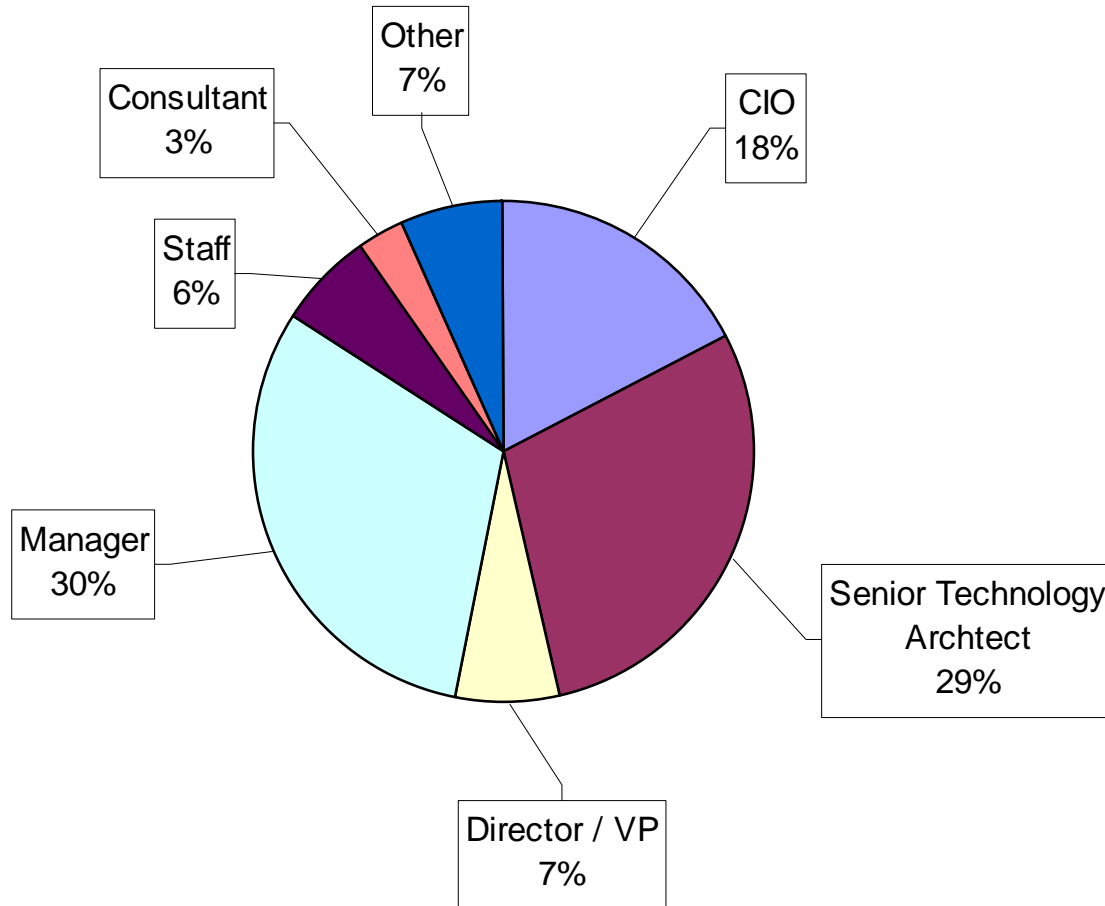
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# 2000 Survey Results

- 1,972 surveys sent (1,954 in 1999)
- 506 responses received (407 in 1999)
- 26% response rate of those surveyed
- 23% of the responses from CIOs
- 53% of the responses from the Technology Architects
- Use Web for survey

# 2001 Survey Results

- 1956 surveys sent – 301 responses – 15.4%



# Implemented Suggestions

- Inform respondents of survey length
- Simplifying to one pass
- Use frequency instead of rank 1-5
- Change the concerns so that
  - They reflect CIO (strategic) concerns instead of technology issues
  - Narrow the topic areas to meaningful and understandable issues

# Top Five Concerns of All Responders



- 1. Security:** Protecting sensitive data / resources (authentication and authorization)
- 2. Internet presence and internet-based business:** Business to customer (marketing, sales, customer relationship)
- 3. IT value proposition:** Competitive advantage
- 4. Internet presence and internet-based business:** Core services (email, calendaring, application access, data access)
- 5. Platform Futures:** Availability of critical applications (on my platform of choice)

# Top Five Concerns of CIO's



1. **Security:** Protecting sensitive data / resources (authentication and authorization)
2. **IT value proposition:** Competitive advantage
3. **Internet presence and internet-based business:** Core services (email, calendaring, application access, data access)
4. **Internet presence and internet-based business:** Business to customer (marketing, sales, customer relationship)
5. **Applications Development:** Multi-platform development & deployment, including wireless

# 2002 Survey



- 2198 Survey Invitations
- 326 individual responses
- 14.8% response rate

# 2002 Survey



- Like 2001 with a few additions:
  - Security
    - Business continuity planning / disaster recovery
  - Platform Futures
    - Grid Computing
  - Enterprise-Wide System Management
    - Delivering end user services (e.g. help desk)
  - Application Development
    - Competing industry standards (e.g. Java vs. .Net)

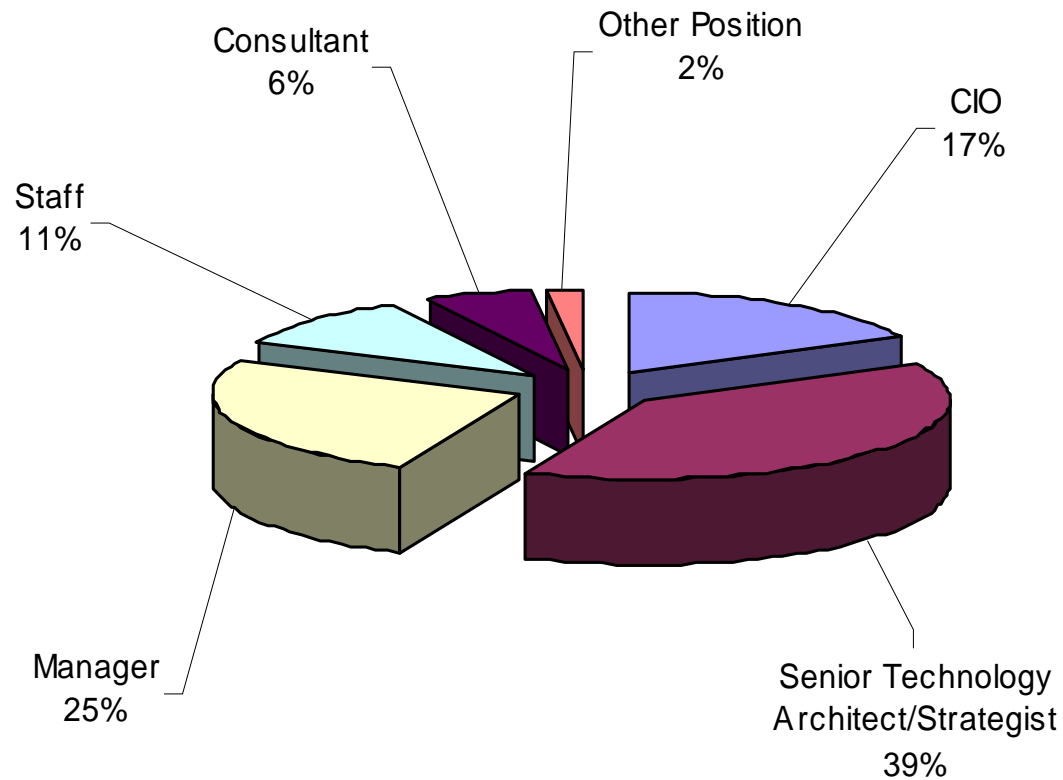


# 2002 Survey

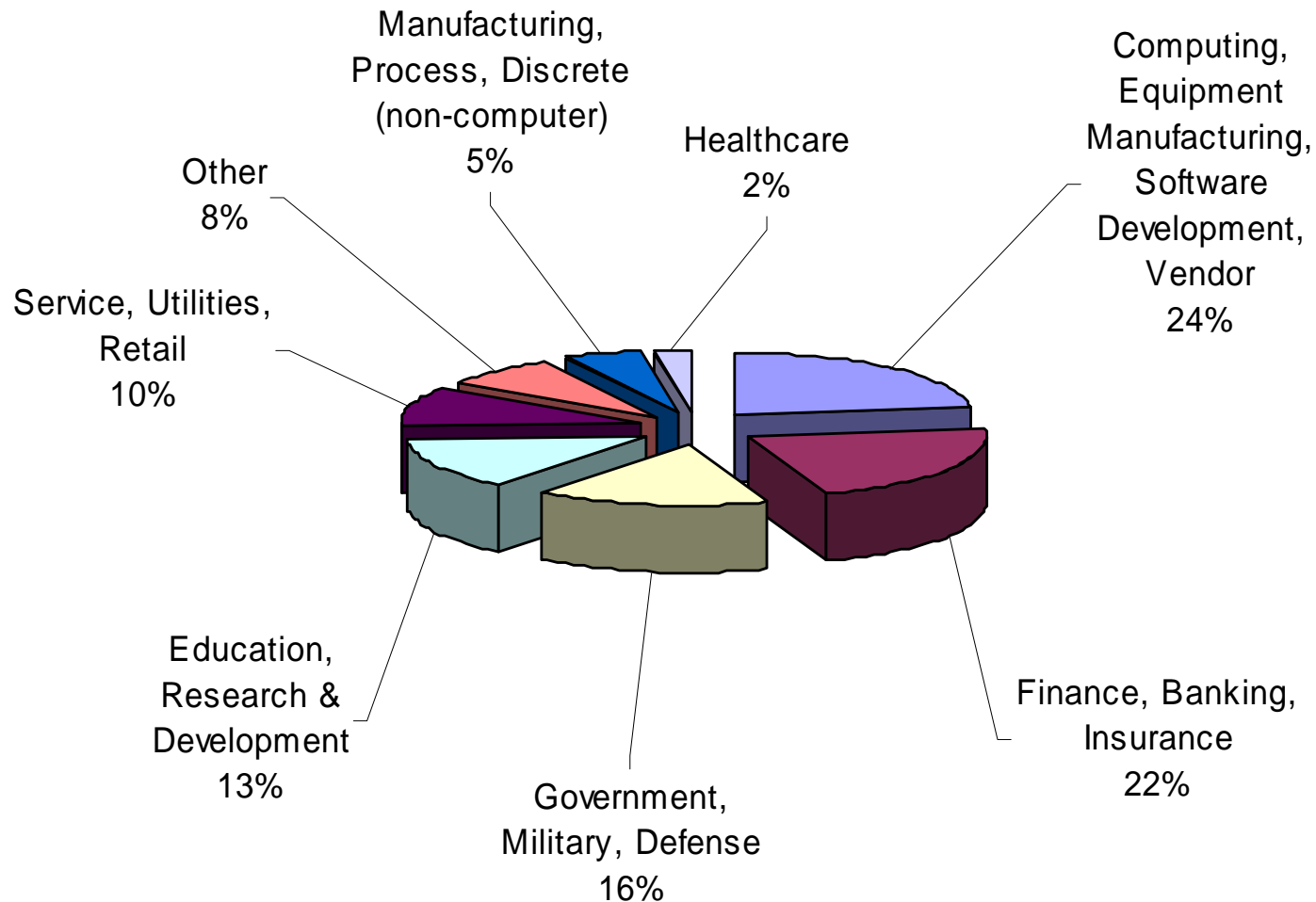


- Why such minimal changes?
  - 2001 survey covered most bases
  - Resist the temptation to focus on favorite technologies
  - Stay strategic
  - Want to have a trend analysis capability

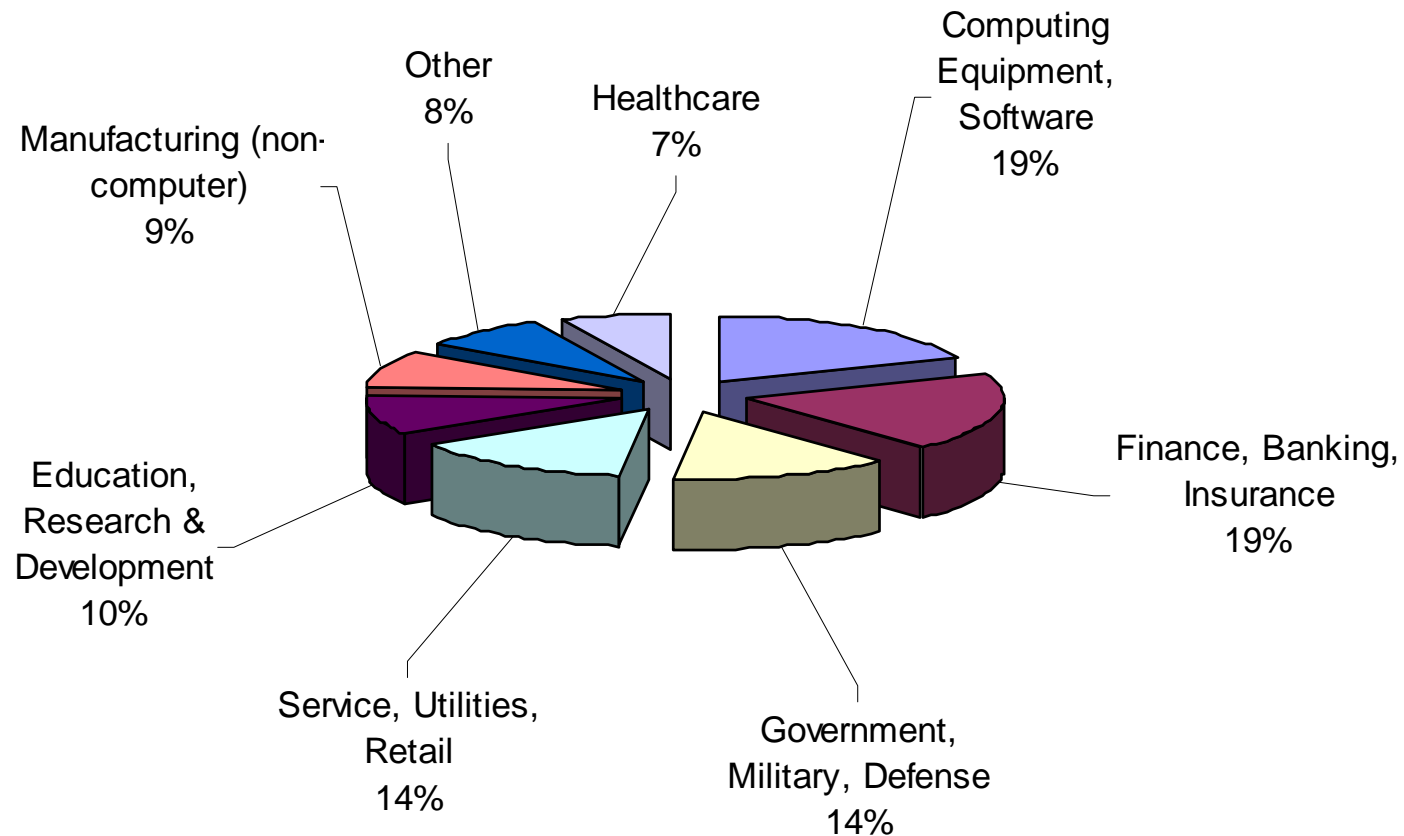
# Responses by Management Level



# Responses by Industry



# SHARE Membership by Industry



# Big Ten Concern

- When Penn State Joined the Big Ten:  $10 = 11$
- Even so, Neither PSU or I claim responsibility...



# Top 10 Concerns – All Respondents

Strategic Concern	Percent of Total	Category	2001 Rank
1. Protecting sensitive data/resources	46.63%	Security and privacy	1
2. Business to customer	28.83%	Internet presence & Internet-based business	2
3. Multi-platform development, integration and deployment	27.91%	Applications development	6
4. Pricing/Terms & Conditions/Total Cost of Ownership	25.77%	Vendor relationships	8
5. Delivering transaction performance across complex platforms	24.85%	Enterprise-wide systems management	10
6. Core services	23.62%	Internet presence & Internet-based business	4
7. Relevance to corporate strategy	23.62%	IT value proposition	7
8. Availability of critical applications	23.31%	Platform futures	5
9. Competitive advantage	23.01%	IT value proposition	3
10. Business continuity planning/disaster recovery	22.39%	Security and privacy	New
11. Consolidation and centralization of services	22.39%	Enterprise-wide systems management	9

# Top 10 Concerns - CIOs

Strategic Concern	Percent of Total	Category	2001 Rank
1. Protecting sensitive data/resources	40.35%	Security and privacy	1
2. Multi-platform development, integration and deployment	33.33%	Applications development	5
3. Business to customer	29.82%	Internet presence and Internet-based business	4
4. Pricing/Terms & Conditions/Total Cost of Ownership	24.56%	Vendor Relationships	12
5. Consolidation and centralization of services	22.81%	Enterprise-wide Systems Management	16
6. Relevance to corporate strategy	22.81%	IT value proposition	6
7. Business process integration & workflow management	21.05%	Applications development	15
8. Competitive advantage	21.05%	IT value proposition	2
9. Business continuity planning/disaster recovery	19.30%	Security and privacy	New
10. Business to business	17.54%	Internet presence & Internet-based business	7
11. Providing scalable security infrastructure	17.54%	Security and privacy	21

# What Does This Mean



- Disaster Recovery was only new concern to hit top 10
- Our set of choices covers the field pretty well
  - Not seeing any pattern in “Other” responses
  - Only for Computing/Equipment Manufacturing did “Other” come in as a tie for tenth place.
- Upward movement of Business to Customer, Multi-platform Development, Pricing, and Consolidation into the CIO top 5 may be an indicator of economic hard times
- Scaleable Security Infrastructure has hit the top 10 for CIOs



# Concerns About Results

- Want to understand why we have ties
  - External factors?
  - Economy?
- Ask for opinion from AC
- Ask for opinion from other groups like Giga & Meta
- Look at responses by industry segment
  - Will have that in the summary report
- Look at survey mix
  - Drop out low vote getters
  - Any possible “motherhood & apple pie” issues?

# Work In Progress

- Simple, publishable format
- Present to Advisory Council
  - ask them for interpretation
- Report back to responders
- Look at ways to use and market
- Look at future opportunities
- Gear up for next year

# Opportunities for Improvement

- Need more responders
  - Change time of survey?
  - Get better contacts?
  - Improve content?
  - Other suggestions?
- Check “Other” for fit into a bucket?
  - Not much there this time
- Like the way the process was handled
- Like the web-only approach
- Open for ideas for new topics, and how to institutionalize picking topics.

# SHARE 2002 Strategic Concerns



## Questions or Comments?