SHARE 2002 Strategic Concerns

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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%

[Pie chart showing the distribution of respondents by job title: CIO (18%), Senior Technology Architect (29%), Director / VP (7%), Manager (30%), Staff (6%), Consultant (3%), Other (7%)].
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

- Senior Technology Architect/Strategist: 39%
- CIO: 17%
- Manager: 25%
- Staff: 11%
- Consultant: 6%
- Other Position: 2%
Responses by Industry

- Manufacturing, Process, Discrete (non-computer) - 5%
- Healthcare - 2%
- Other - 8%
- Service, Utilities, Retail - 10%
- Education, Research & Development - 13%
- Government, Military, Defense - 16%
- Computing, Equipment Manufacturing, Software Development, Vendor - 24%
- Finance, Banking, Insurance - 22%
Big Ten Concern

- When Penn State Joined the Big Ten: $10 = 11$
- Even so, Neither PSU or I claim responsibility…
<table>
<thead>
<tr>
<th>Strategic Concern</th>
<th>Percent of Total</th>
<th>Category</th>
<th>2001 Rank</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Protecting sensitive data/resources</td>
<td>46.63%</td>
<td>Security and privacy</td>
<td>1</td>
</tr>
<tr>
<td>2. Business to customer</td>
<td>28.83%</td>
<td>Internet presence &amp; Internet-based business</td>
<td>2</td>
</tr>
<tr>
<td>3. Multi-platform development, integration and deployment</td>
<td>27.91%</td>
<td>Applications development</td>
<td>6</td>
</tr>
<tr>
<td>4. Pricing/Terms &amp; Conditions/Total Cost of Ownership</td>
<td>25.77%</td>
<td>Vendor relationships</td>
<td>8</td>
</tr>
<tr>
<td>5. Delivering transaction performance across complex platforms</td>
<td>24.85%</td>
<td>Enterprise-wide systems management</td>
<td>10</td>
</tr>
<tr>
<td>6. Core services</td>
<td>23.62%</td>
<td>Internet presence &amp; Internet-based business</td>
<td>4</td>
</tr>
<tr>
<td>7. Relevance to corporate strategy</td>
<td>23.62%</td>
<td>IT value proposition</td>
<td>7</td>
</tr>
<tr>
<td>8. Availability of critical applications</td>
<td>23.31%</td>
<td>Platform futures</td>
<td>5</td>
</tr>
<tr>
<td>9. Competitive advantage</td>
<td>23.01%</td>
<td>IT value proposition</td>
<td>3</td>
</tr>
<tr>
<td>10. Business continuity planning/disaster recovery</td>
<td>22.39%</td>
<td>Security and privacy</td>
<td>New</td>
</tr>
<tr>
<td>11. Consolidation and centralization of services</td>
<td>22.39%</td>
<td>Enterprise-wide systems management</td>
<td>9</td>
</tr>
</tbody>
</table>
## Top 10 Concerns - CIOs

<table>
<thead>
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<th>Strategic Concern</th>
<th>Percent of Total</th>
<th>Category</th>
<th>2001 Rank</th>
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<tr>
<td>1. Protecting sensitive data/resources</td>
<td>40.35%</td>
<td>Security and privacy</td>
<td>1</td>
</tr>
<tr>
<td>2. Multi-platform development, integration and deployment</td>
<td>33.33%</td>
<td>Applications development</td>
<td>5</td>
</tr>
<tr>
<td>3. Business to customer</td>
<td>29.82%</td>
<td>Internet presence and Internet-based business</td>
<td>4</td>
</tr>
<tr>
<td>4. Pricing/Terms &amp; Conditions/Total Cost of Ownership</td>
<td>24.56%</td>
<td>Vendor Relationships</td>
<td>12</td>
</tr>
<tr>
<td>5. Consolidation and centralization of services</td>
<td>22.81%</td>
<td>Enterprise-wide Systems Management</td>
<td>16</td>
</tr>
<tr>
<td>6. Relevance to corporate strategy</td>
<td>22.81%</td>
<td>IT value proposition</td>
<td>6</td>
</tr>
<tr>
<td>7. Business process integration &amp; workflow management</td>
<td>21.05%</td>
<td>Applications development</td>
<td>15</td>
</tr>
<tr>
<td>8. Competitive advantage</td>
<td>21.05%</td>
<td>IT value proposition</td>
<td>2</td>
</tr>
<tr>
<td>10. Business to business</td>
<td>17.54%</td>
<td>Internet presence &amp; Internet-based business</td>
<td>7</td>
</tr>
<tr>
<td>11. Providing scaleable security infrastructure</td>
<td>17.54%</td>
<td>Security and privacy</td>
<td>21</td>
</tr>
</tbody>
</table>
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.
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Questions or Comments?