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High performance. Delivered.

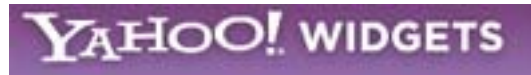
Power shift: The future of technology and what it means for the enterprise

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A lot happened in 2007



Market Caps

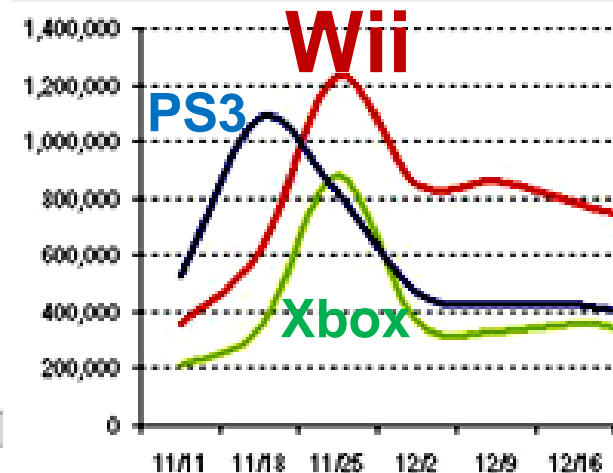
Apple	\$155B
IBM	\$137B
Intel	\$131B



Analysis from FORTUNE: Plugged In

U.S. Video Game Console Demand

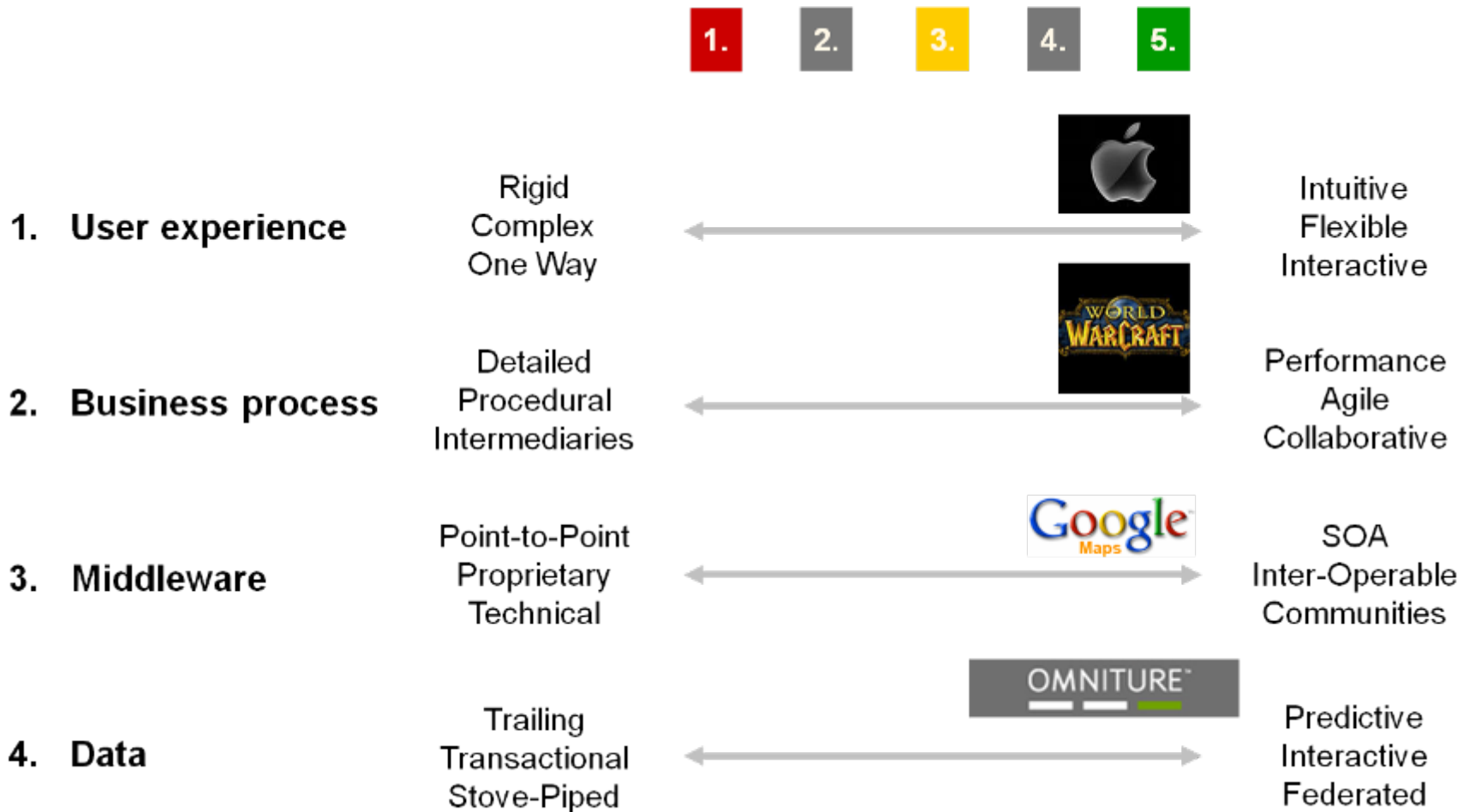
(Consumers shopping for each console, weeks ending Nov. 11, '07)



Ready for \$262 a barrel oil?

Two of the world's most successful investors say oil will be in short supply in the coming months.

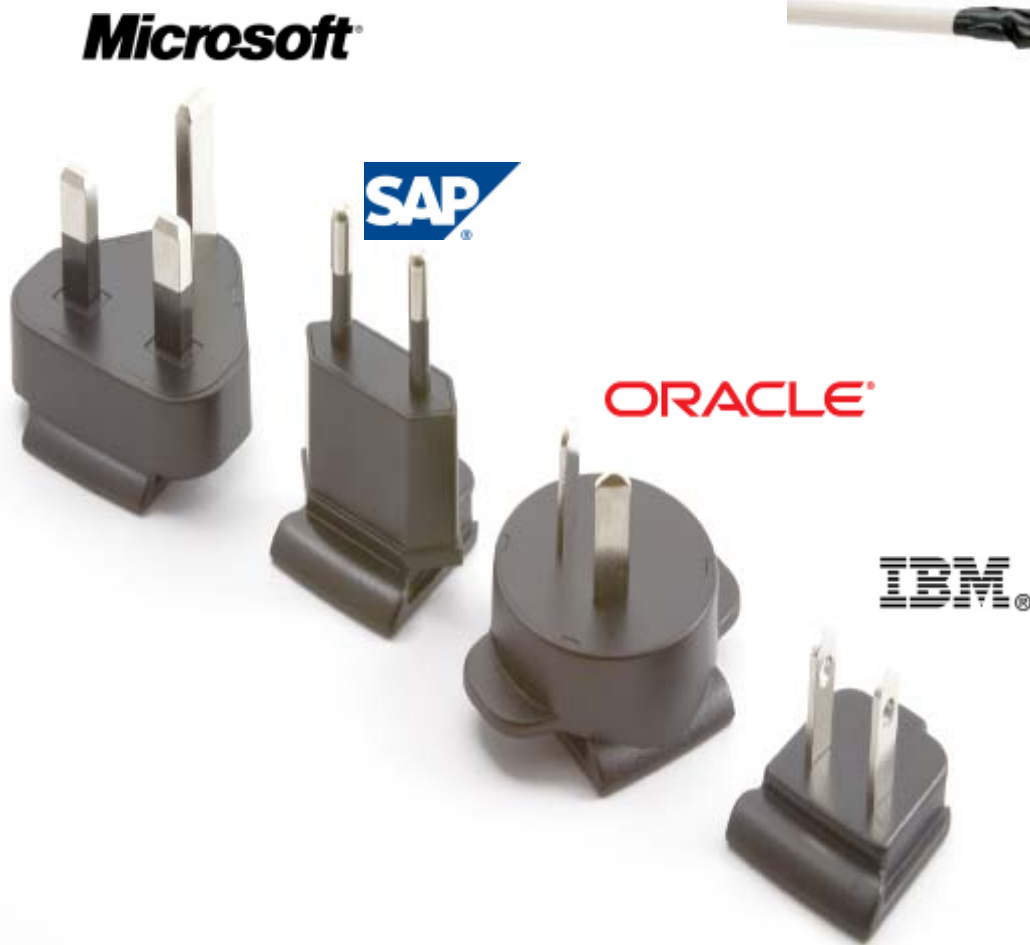
Consumer innovations are raising the bar for business - “gidy” ;) versus “ttswtts” [:(



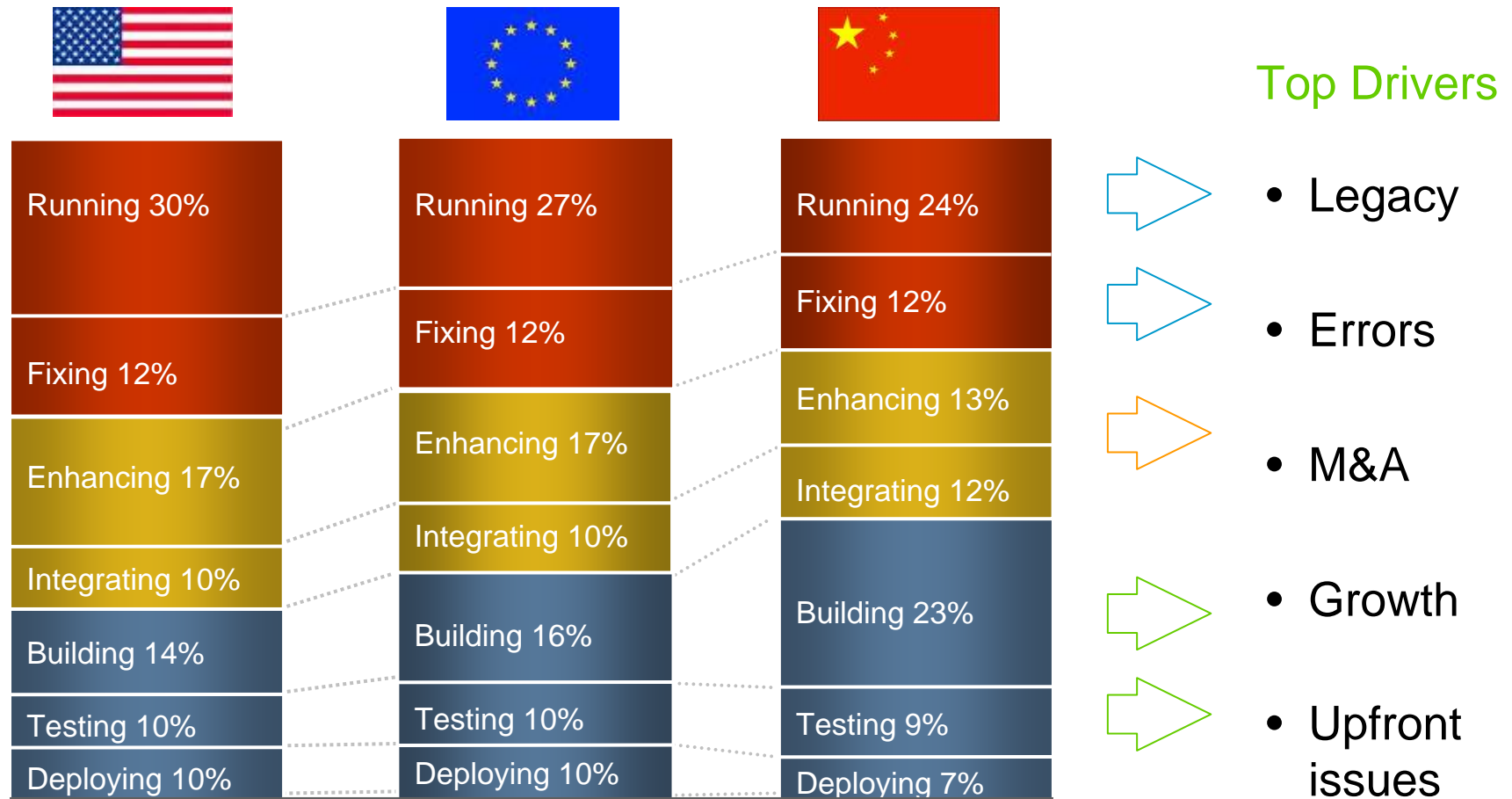
A power shift from the technology to people



Yet, most organizations still struggle with the basics



High Performance IT Council Survey of 500+ CIO's

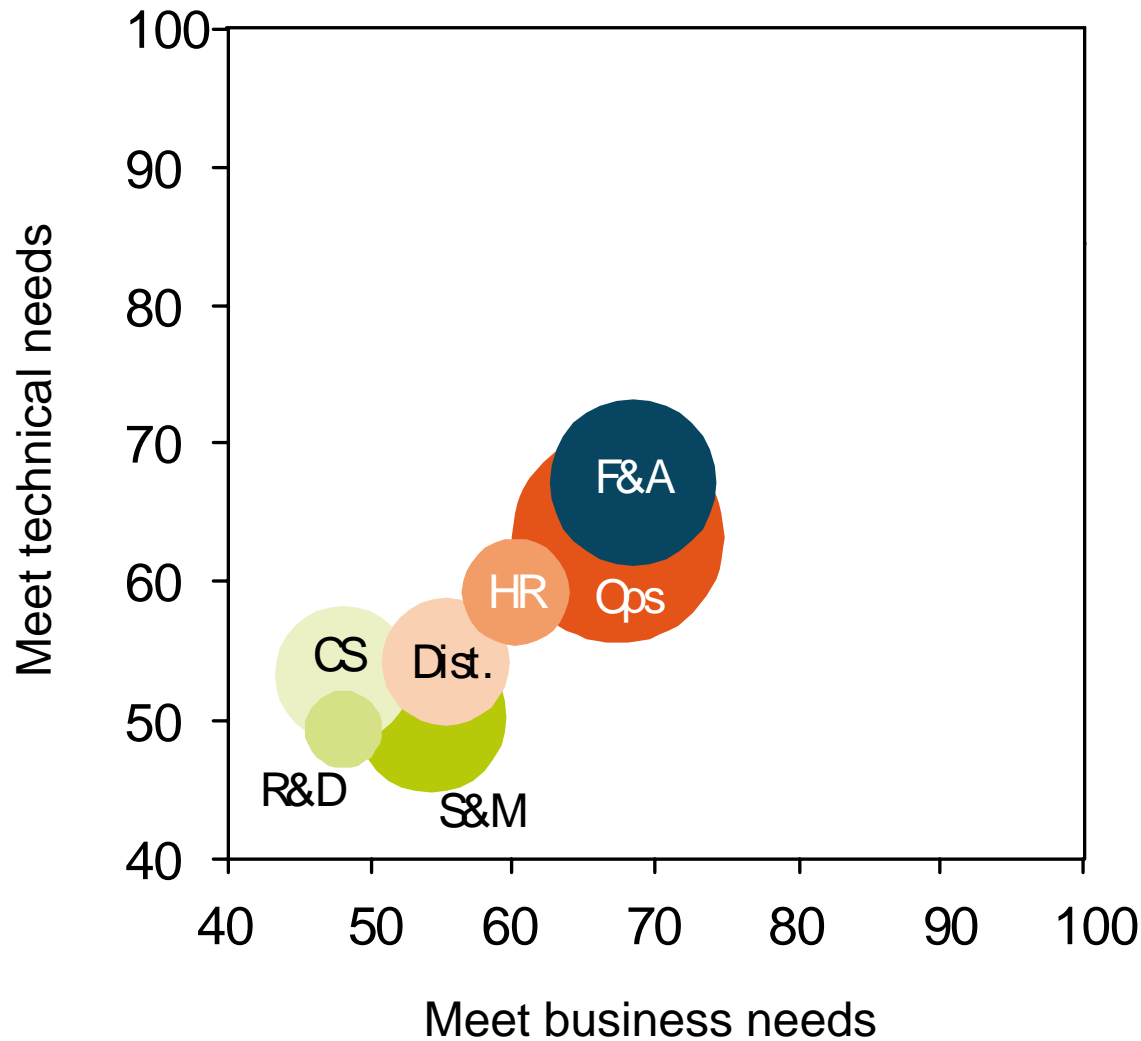


Source: Accenture High Performance IT Research

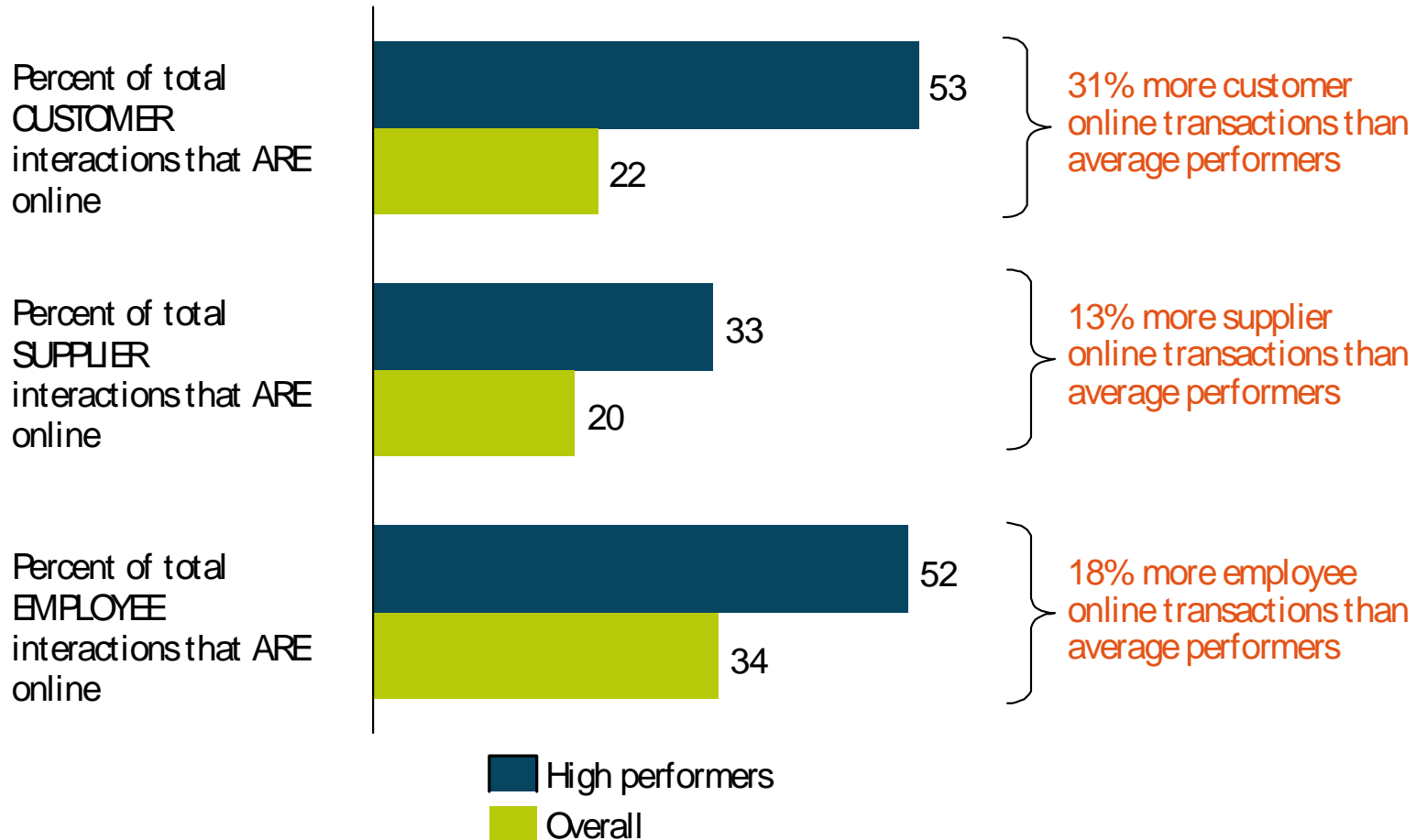
CIO's First Priority: Investors or Customers?



As a Result, Consumer & Customer Facing Systems have Suffered



Innovation allows High Performers to Increase The Gap

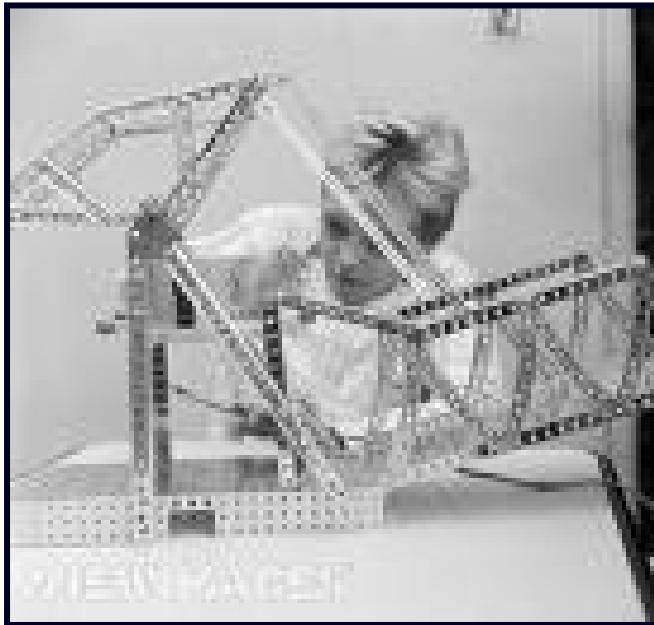


Power Shift: 8 Defining Trends

Accenture Technology Vision

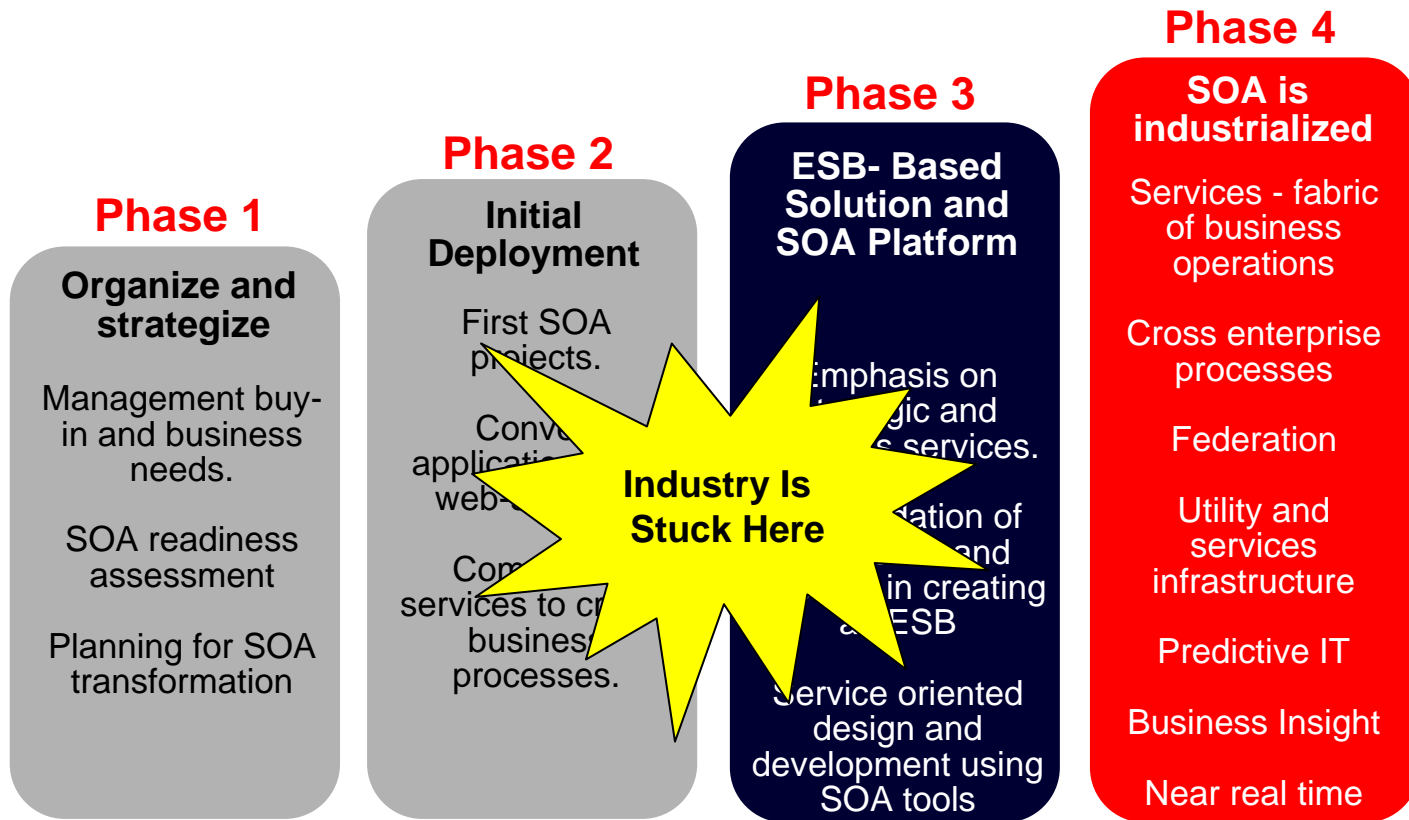
1. Cloud computing & SaaS
2. Systems Integration – Regular & Lite
3. Enterprise intelligence at scale
4. Continuous access to people and content
5. Social computing
6. Explosion of user-generated content
7. Gradual industrialization of SW development
8. Green computing

SOA is a Set of Standards that Increase Modularity and Make the Modules Easier to Use



Adoption of SOA: Accenture's Four stage maturity model

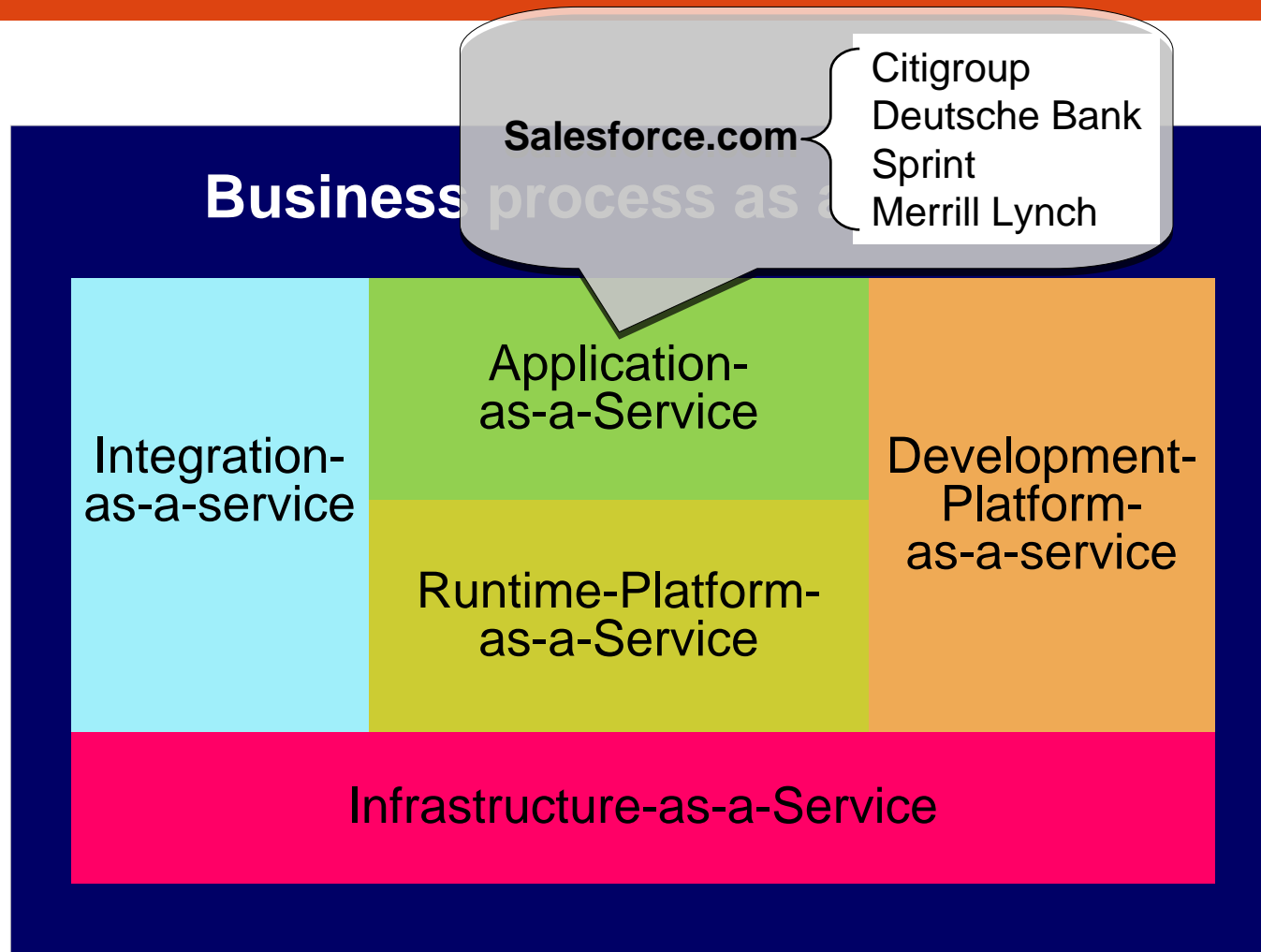
Organizations typically move through four distinct phases



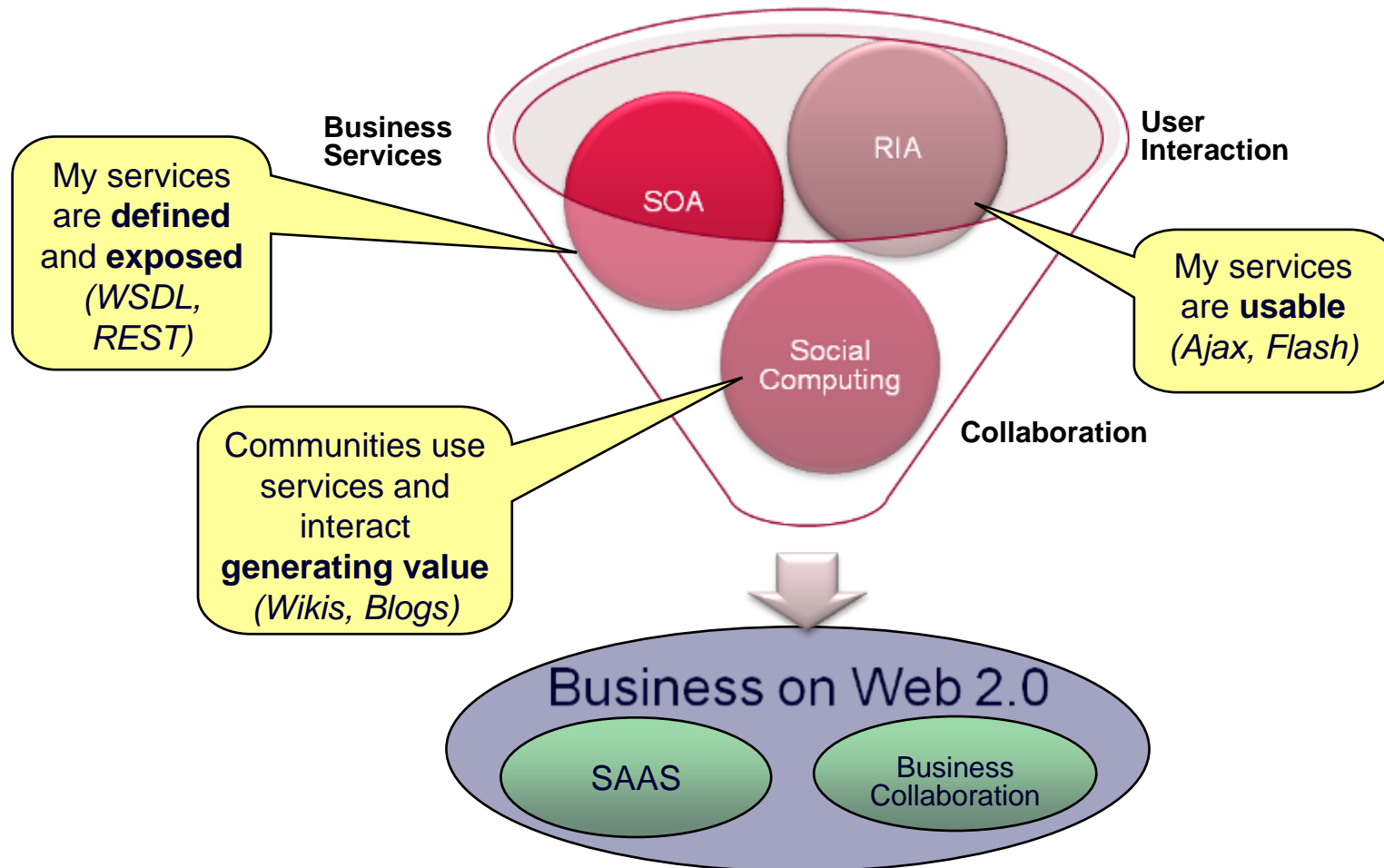
The Fourth Wave . . . SOA

Wave	Drivers / Value
<ul style="list-style-type: none">• Online Transaction Processing (1980s)	<ul style="list-style-type: none">• Need to automate repetitive business transactions within departments
<ul style="list-style-type: none">• Client/Server (1990s)	<ul style="list-style-type: none">• Business Process Re-engineering• Enterprise Resource Planning• Personal Productivity
<ul style="list-style-type: none">• Netcentric (2000)	<ul style="list-style-type: none">• Connect to the customer; customer self service• eCommerce
<ul style="list-style-type: none">• SOA (?)	<ul style="list-style-type: none">• Process-Centric Enterprise• Consumer-driven• “Agility”

Software as a Service (SaaS) offerings, based on SOA architectures, are disrupting Enterprise SW



SOA, Web2.0, and SaaS provide a new foundation for enterprise applications



Open Source is Changing the Dynamics in the Enterprise SW industry

- Open Source Communities
- For-profit companies
- Foundations, funded by traditional software companies



CRM Software



Open. For Business

Office, Email, Mobile



Reporting & Business Intelligence



Content Management



Relational Databases

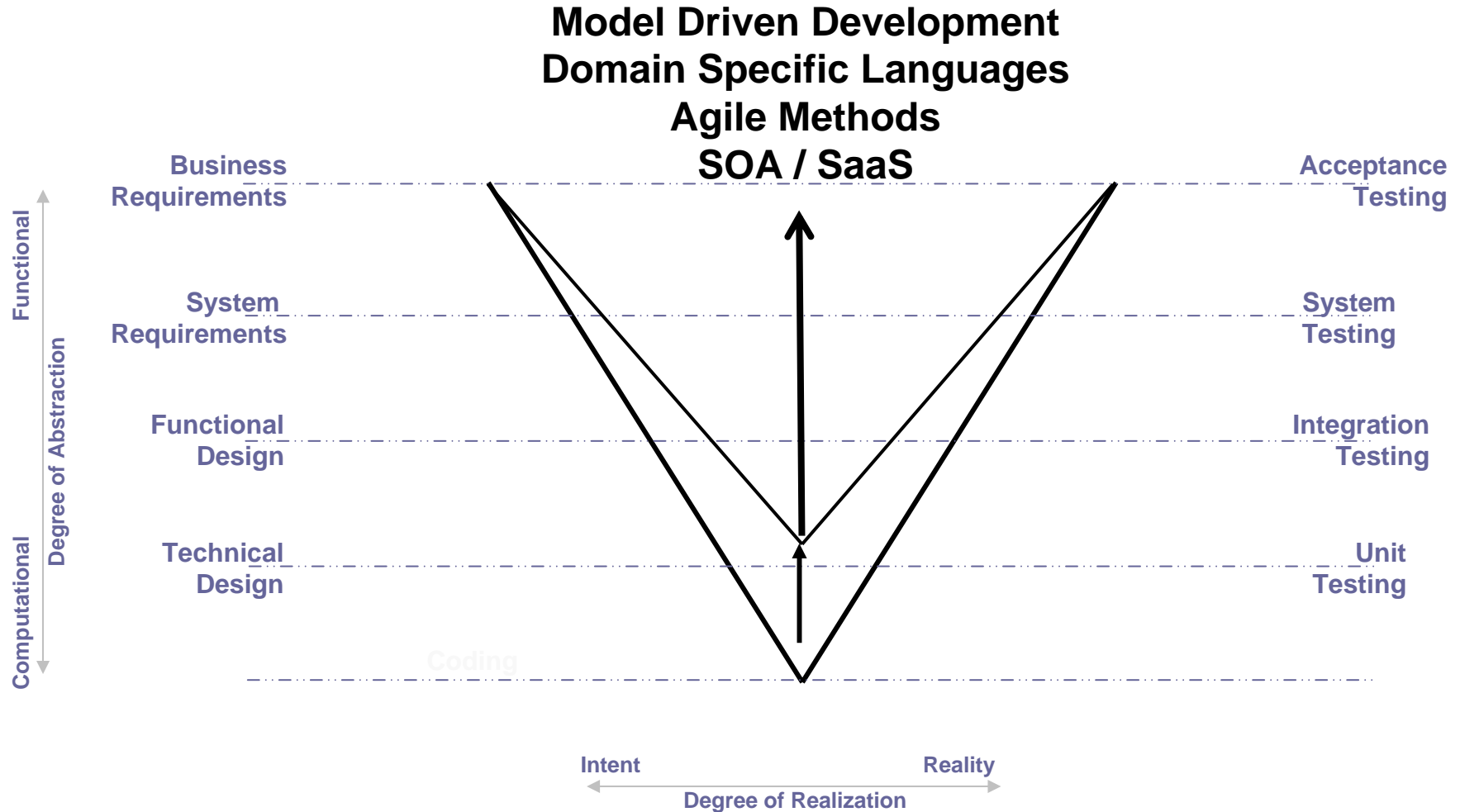


Framework & Tools



Infrastructure: Linux, Portals, Application Servers, Search Engines

New Approaches for Industrializing the Software Development Lifecycle



V-Model of Software

Power Shift: Questions to consider

- Is your company a High Performer?
- Are you positioned for the shift to consumer-driven IT?
- What level of innovation is appropriate, and how do you accomplish it?
- How well does your Company understand its Business Processes?
- How do you take IT from a “Craft” to “Engineering”?
- Flexibility Matters - How dynamic is your Architecture?



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