



# Trends in Enterprise Applications, Web & Analytics



*Tell me and I'll forget  
Show me and I may remember  
Involve me and I'll understand*

STKI Summit 2012

**Einat Shimoni,**  
VP & Senior Analyst

# The main buzzwords for 2012:

**1. Mobile**

**2. Social**

**3. Big data &  
Analytics**

**4. Cloud**



Enterprise applications delivery models: SaaS

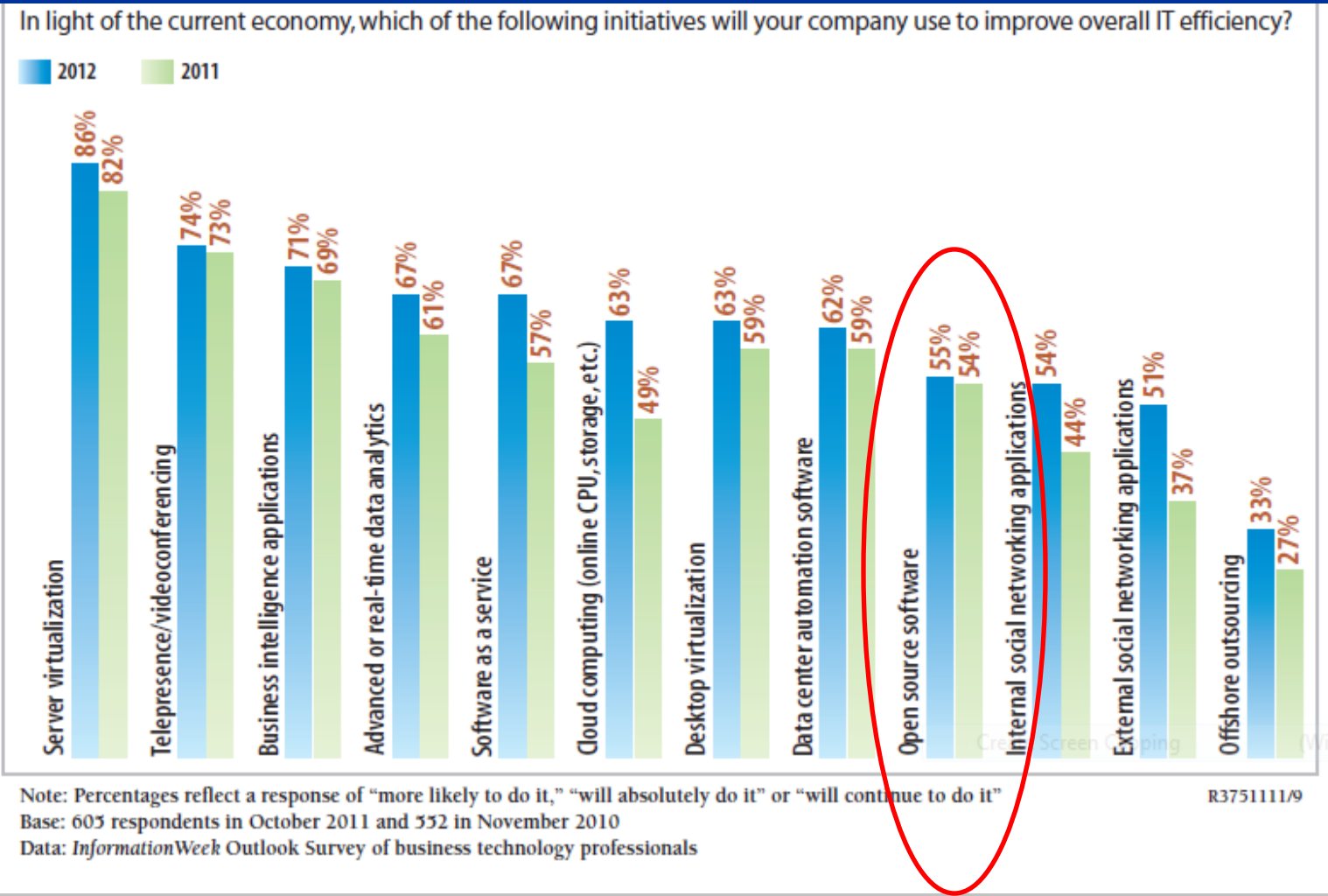
**>50% using SaaS**

2012

**For <10% of applications**

# Open Source apps, anyone?

No major change in usage of OS apps in Israel, still very low.  
We have seen some projects in WCM this year.



# Context-based Services (Source: Accenture technology vision 2012)

“Where you are and what you’re doing – will drive the next wave of digital services”



# Voice is the next UI



Source: Soapcreative.com

# More applications will be activated by voice “personal assistants”



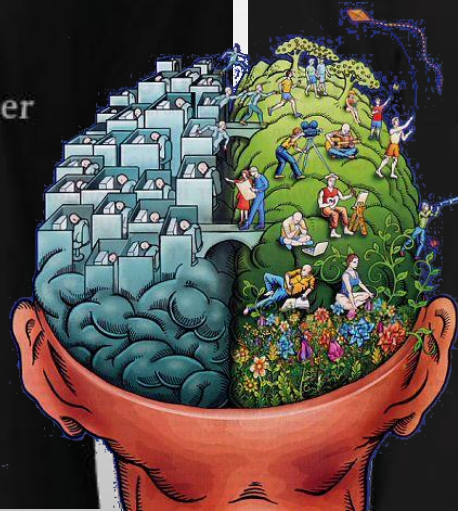
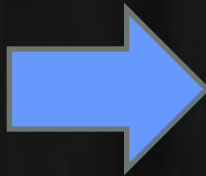
# Most important application customers for 2012

# MOST IMPORTANT



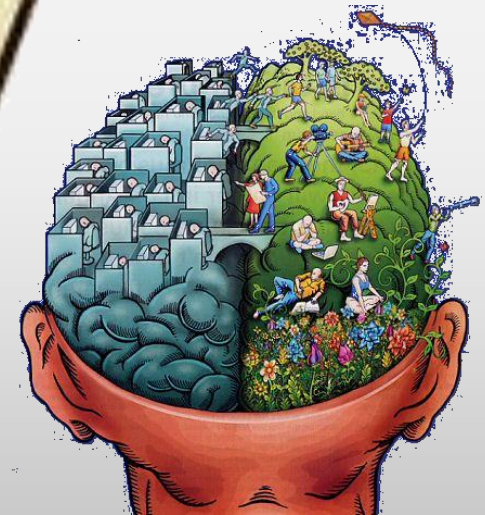
**CFO**  
Chief Financial Officer

**CMO**  
Chief Marketing Officer

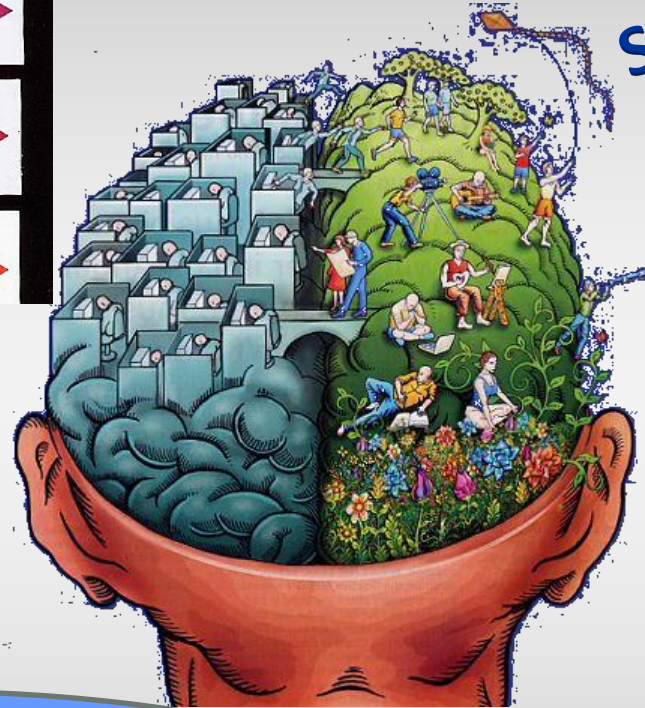




# CFO: User of the year 2011



# What will the CMO want in 2012?



Social CRM

Mobile apps

Sentiment analysis

New website

Clickstream analysis

Oh, and make everything context-based, please.

ONCE UPON A TIME...

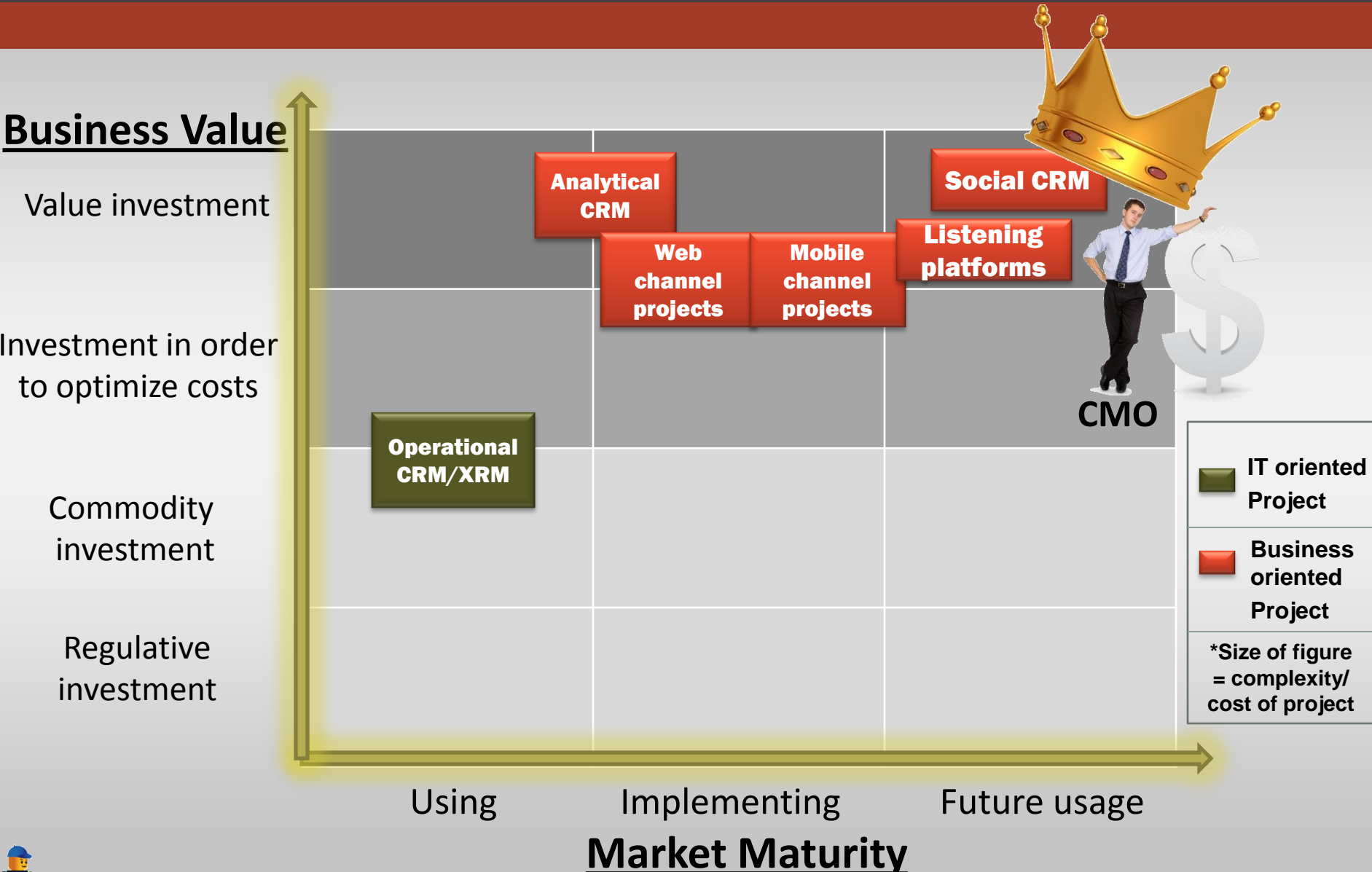
# 2012: The year of Social CRM

Listening  
platforms

Web

Social  
media

# CRM Maturity Model



- IT oriented Project
- Business oriented Project

\*Size of figure = complexity/ cost of project

# New IT client: Chief Marketing Officer (CMO)

There are only 3 reasons why you choose to buy a product or a service :

1. *It's the cheapest*
2. *It's unique*
3. *You're sold on marketing!!*

I'm so important



as goods and services become commoditized, the customer experiences that companies create, lead to sustainable differentiation



- **The new CRM customer is the CMO / customer experience manager**
- **We will see many customer experience projects in the financial services market in Israel (e-Banking, new websites, multi channel, Social CRM etc.)**
- **Customer information will be mined from external sources (web, social media etc.), other new resources such as loyalty cards**
- XRM (~ 25% of the CRM market) – flexibility, ease of development and self customizing options have become a major criteria for CRM package choice. Microsoft is the big winner in this category (Israeli examples: legal files mng., trading system, grants mng., internet advertising “real estate” mng.)
- Microsoft is shaking up the CRM SaaS market with low pricing (44\$ per user)
- CRM is now sending out tweets! Some packages (i.e, Salesforce chatter) include messaging capabilities between individuals and systems, we will see more of that
- Mobile CRM is becoming a must (specifically for sales and field service)

# Web is the new CRM

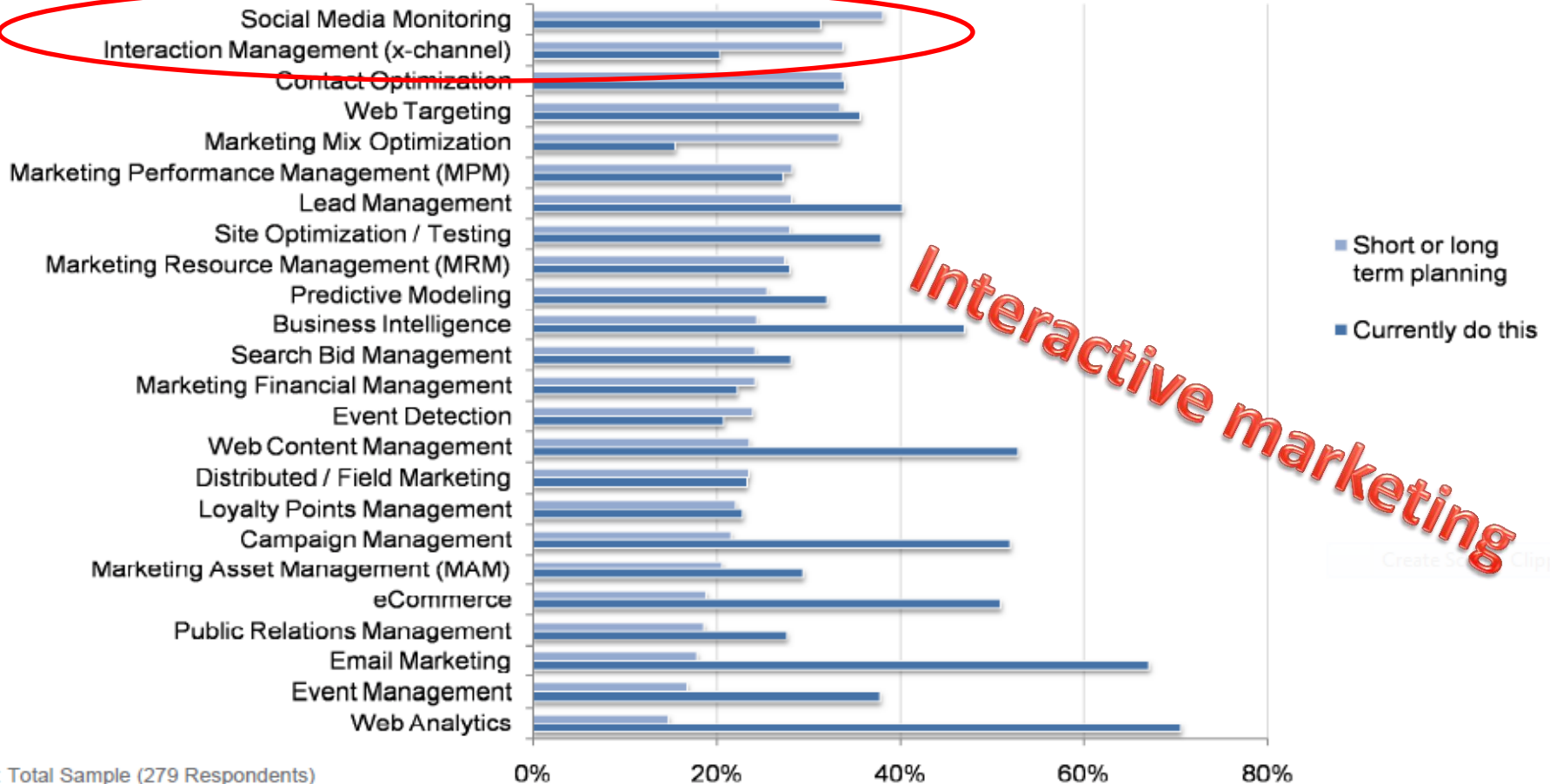
Organizations are skipping “back end” operational CRM and going straight to the customer frontier

**CANCELLED**

**If the customer doesn't feel the impact of a CRM project it will not be approved!**

# Most interesting marketing tools

Q. Which of the following marketing software categories does your company currently use or is planning to use?



Base: Total Sample (279 Respondents)

0% 20% 40% 60% 80%

Unica, an IBM Company | [www.unica.com](http://www.unica.com)

(Source: IBM Unica)



# Experience Economy > Age of the Customer

From 1900 to 1960, **Age of Manufacturing**, if you owned a factory, you owned the market.



From 1960 to 2000, **Age of Distribution**, if you owned the distribution channels, you owned the market.



From 2000 to 2011, **Age of Information**, if you owned the information, you owned the market.



From 2011, **Age of the Customer**, if you engage the customer, you own the market



# Accelerating customer experience

## CRM 1.0

Managing Individual customers



Customer A      Customer B      Customer C

## CRM 2.0

Managing influencers & 'tribes'



## CRM 3.0

Engaging & Influencing



# The focus shift:

Transactions → Interactions →

Experience

Generation Z  
is here.

Connected

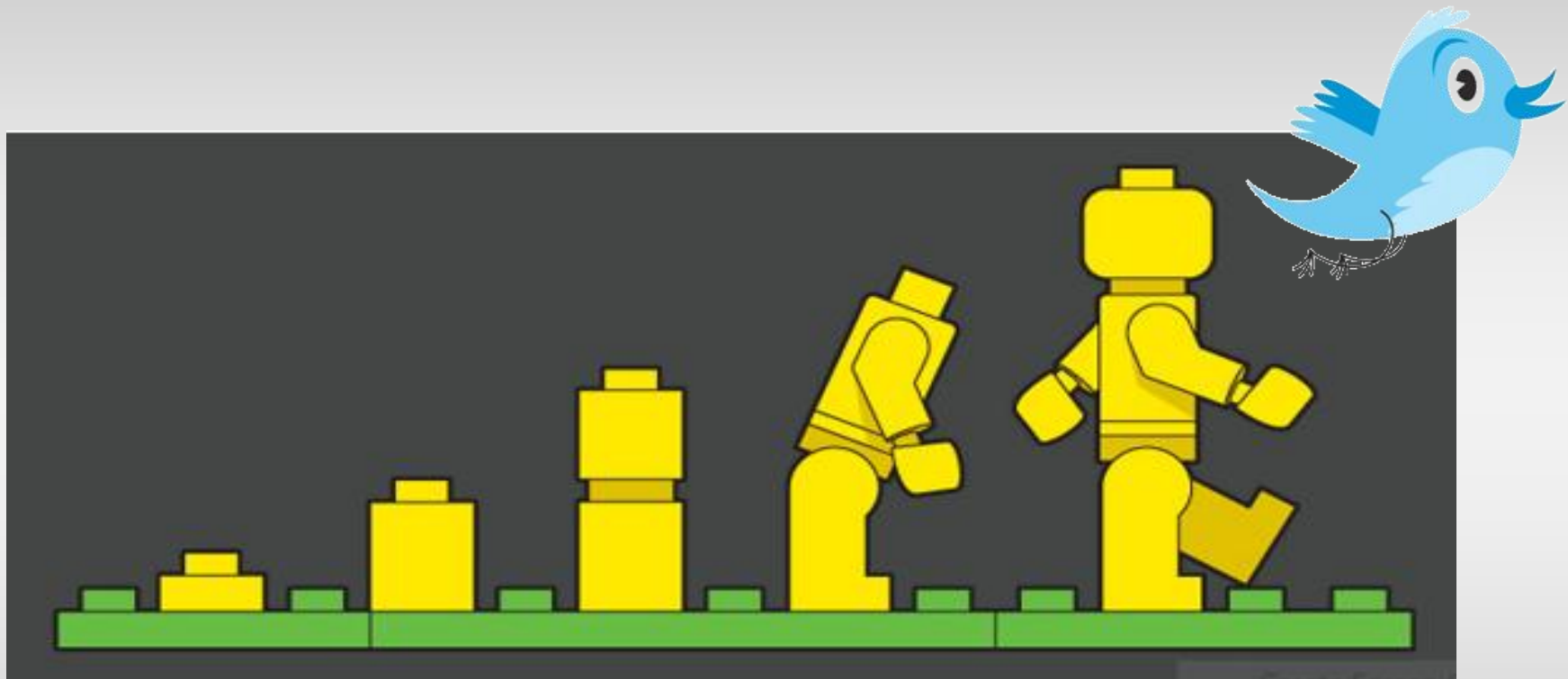
Multitasking

Born Digital



\* Born 1990-now

# Will social CRM finally get CRM right?



“

'Social CRM is the company's response to customer's control of the conversation'

”

Paul Greenberg - Author of CRM at the Speed of Light.

# What is Social CRM

Social CRM can be used for 2 purposes:

- **Listening and Learning:** Using the power of personal networks to gain intelligence on customers, their habits, interests
  - Brand auditing
  - Awareness of campaigns success/failure
  - Crowdsourcing (new products, design ideas)
- **Interacting and Engaging:** New channel for customer interactions (sales, service, marketing)

Social CRM projects will be short / simple. Companies will grow into it (by using social CRM modules within CRM apps) or SaaS-based products. The hardest part will be the “people” and “processes” part, change management.

# Social media projects maturity



Source: Altimeter Group

Source: [http://www.slideshare.net/jeremiah\\_owyang/social-crm-the-new-rules-of-relationship-management](http://www.slideshare.net/jeremiah_owyang/social-crm-the-new-rules-of-relationship-management)

# Social CRM starting to be more practical

## Salesforce acquires Radian6 (leading listening platform)



**WE'RE LISTENING.**

## Ness-Gilon BPAAS: Loyalty program mng. as a service

# Problems with social CRM in Israel:

- Very low twitter usage
- Hebrew!
- Many companies outsource social listening and engagement



# Application development options:



# When to use XRM vs. traditional development?

- When entity model is suitable (saved DBA time)
- When the application is similar to CRM (opening “tickets”, managing “customers” etc.)
- When the application is “data entry”
- When outlook UI is a plus (relevant for Microsoft Dynamics CRM)
- Replacement for simple “access-like” applications
- Not just for saving development time! Ongoing maintenance, version upgrades is more important

# We will present data on products and integrators:

## List of Packages 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
- ▲ Lists might not include all players

# CRM Packages & Integrators in Israel (Part 1):

Package	Rep in Israel	Integrators	Delivery model
Oracle – Siebel	Oracle Israel	Taldor, IBM, Matrix (BeyondIT), Unitask (Exscientia), TATA-TCS, IT Navigator, Yael, Ness	On Premise
Oracle SCOD: Siebel on-Demand	Oracle Israel	Taldor, ManofIT, Unitask (Axcentia), Yael	<b>SaaS</b>
Oracle e-Business CRM	Oracle Israel	Yael, Malam-Team, ONE1UP, Oracle, HP, Advantech	On Premise
Oracle - Peoplesoft	Oracle Israel	Matrix	On Premise
SAP CRM	SAP Israel	Ness, Advantech, Taldor, Explore, ValuePlus	On Premise
SAP CRM on Demand	SAP Israel		<b>SaaS</b>
Amdocs (Clarify)	Amdocs	Amdocs	On Premise
Microsoft Dynamics CRM	Microsoft Israel	Partial list: Matrix-Effect, Advantech, Malam-Team, Netwise (+Agile), Aman ,Elad (Eyron), Prodware, Pilat ITCom, SIT, One1, Webox (Cloud)...	On Premise; Hosted - partners; <b>SaaS</b> (Live - MSFT)

# CRM Packages & Integrators in Israel (Part 2):

Package	Rep in Israel	Integrators	Delivery model
Salesforce.com	ONE1, Blat-Lapidot, Service Wise, Integrity Software		<b>SaaS</b>
MEGA Center	Yael	Yael	On Premise
Pivotal	One1	ONE1, PILAT IT COM	On Premise
Onyx (Consona)	IT Navigator	IT Navigator	On Premise
Netsuite	NetCloud, Pilat IT Com		<b>SaaS</b>
MyBusiness	MyBusiness	MyBusiness	<b>SaaS</b>
Cemax	Cemax	Cemax	On Premise
Zoho CRM	HolisticCRM	HolisticCRM	<b>SaaS</b>
SugarCRM + Vtiger (Open Source)			Open source, <b>SaaS</b>

# Microsoft dynamics-Based CRM Solutions - Part 1

Company	Solution
Matrix - Effect	E-Drive (Car Market)
	Capital Market: "Optimi"
	Advisor Platform (יועצי השקעות)
	פניות ציבור (מענה לחוק חופש המידע)
	High Tech Solution
	Service Desk
	פתרון לניהול גביה והליכים משפטיים
	Infrastructures: configuration mng, dashboard, self service, CDI, XRM
	IT Help Desk
	Contact center - moked
	Analytical Dynamic CRM
	mobile interface
	Appointment coordination
	Social crm
	CCA
משרדי ממשלה	
retail מועדון לקוחות	
ניהול הפצה ושליחים	

# Microsoft dynamics-Based CRM Solutions - Part 2

Company	Solution
Malam-Team	CRM for security org./departments
	HRM - Healthcare CRM, hospital risk management
	DRM - Donors relationship management
	IT Help Desk
	Academy - Alumni, Student, scholarship grant mng, training courses
	Contact Center
	Retail CRM
	VC - Venture capital CRM
	Partner Relationship Management
	Billing
	Financial services and Retail banking
	HR management solution
Almog	Citizen relationship management
	Vehicle Fleet management
	SMS distribution
Pricelists update	

# Microsoft dynamics-Based CRM Solutions - Part 3

Company	Solution
SIT	Contribution System
	Donors CRM
	Conferences and training
	Members club
	CRM for High-Tech sector
	Customer Service Portal
Advantech	Capital Market
	ניהול פניות ציבור
	Surveys module
	MOSS and CRM integration
	BI for CRM
	IT HelpDesk
	חברות בניה
	משרדי רואי חשבון
Broad Digital	Billing, Rating, Account Receivables
Generica (+ONE1 as marketing partner)	Capital Market operational system



# Microsoft dynamics-Based CRM Solutions - Part 4

Company	Solution
Elad (Eyron)	Election campaign management
	IT-HelpDesk
	CRM-Forex
	Legal and Risk Management
	ניהול ועדות
	Public Appeals
	On-Line CRM
	BI for CRM
	CRM Lease
	Veritouch: CRM for Banking based on Dynamics CRM (a worldwide product represented by Elad)
Netwise	AtoZ: ניהול פניות / מוקד
	BtoZ: ניהול מוקדי בקרה מרכזיים
	ItoZ: דוניהול מוקדי
	MtoZ: ניהול מוקדי פניות מוניציפאליים
	HR companies' operations and clients
	Proactive Analytical CRM solution

# CRM-Related Applications:

Solution	Description	Developing/ Representing Company
Callidus	Performance and Incentives mng	Advantech
Incentives Pro	Enterprise Incentives Management	Incentives, Matrix-partner
MCx	Multi Channel Platform	Matrix
Loyalty Lab (Tibco)	SaaS based Loyalty Management	Yael
Clicksoftware - ClickRoster	Scheduling and optimization of service center, field service	Advantech
oracle real time scheduling	Scheduling and optimization of service center, field service	Oracle
Fanzila	Social CRM	Ness-Pro
Gigya	Social CRM	Ness-Pro
Odysii	Branch/ Point of Sale empowerment	Odysii, Taldor - partner
Cemax	Feedback Mng, Complaints Mng.	Cemax

# E-Service/KM for service center Applications:

Solution	Description	Developing/ Representing Company
Kana	E-service, customer interaction mng.	Malam-Team
LightHouse	Service Center Knowledgebase	Blue Phoenix, Top solutions – partner
nGenera	Collaborative CRM	Business Solutions
Inqaira (acquired by Oracle)	E-service, customer interaction mng.	Oracle
Brain-i	Knowledgebase for service agents	Matrix
Knova (Consona)	collaborative CRM, KM for contact centers	IT Navigator
Salesforce Chatter, Knowledgebase, Ideas	Collaboration, knowledgebase, customer-centric innovation website	ONE1, Blat-Lapidot

Increased interest in Israel in service center knowledge management solutions


Most enterprises are focusing on internal KM and missing the bigger picture –

## Customer Interaction Management



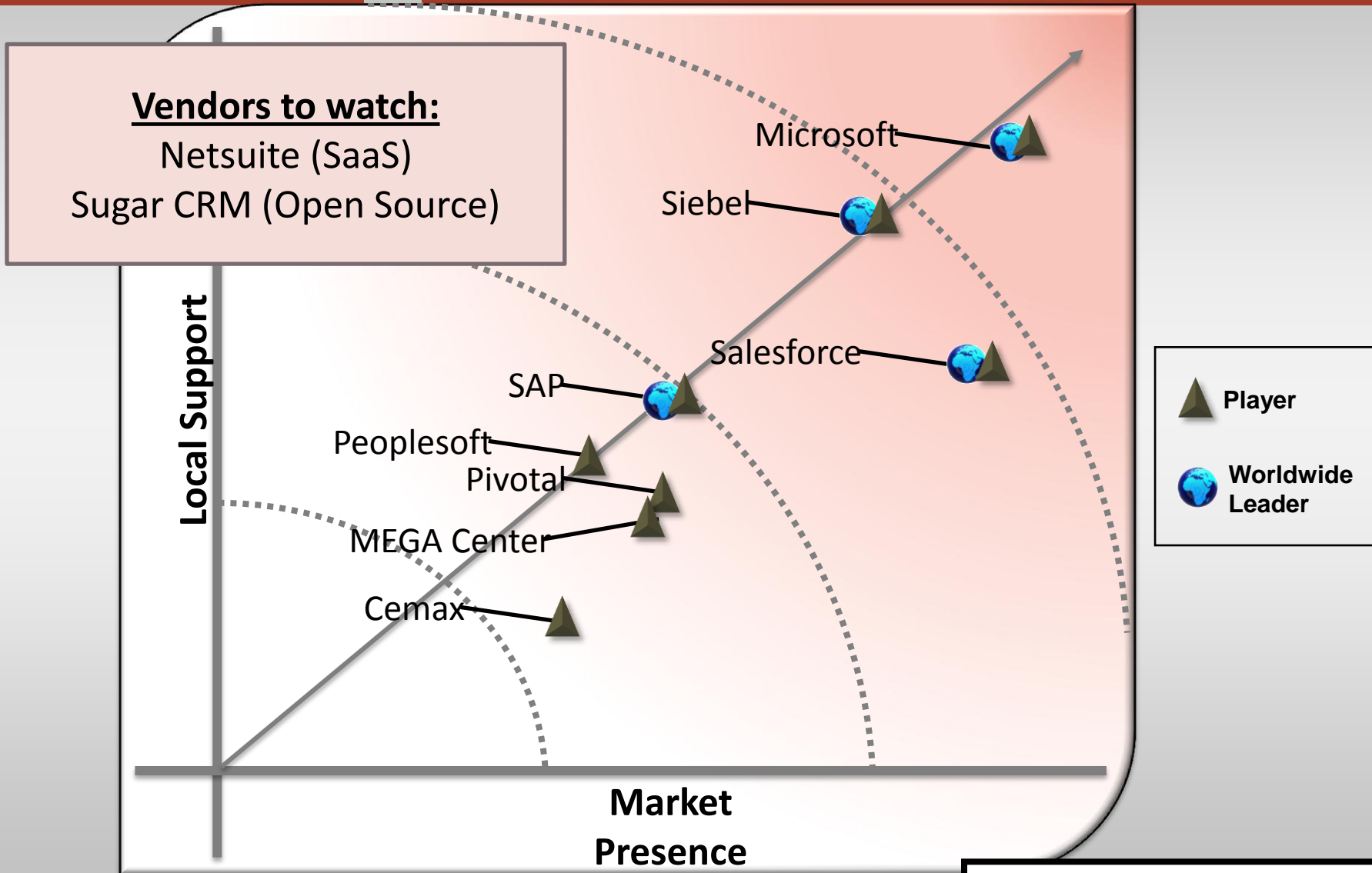
## Israeli vendor positioning

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.
- ▲  Worldwide leaders are marked based on global positioning
- ▲ **Vendors to watch:** Israeli market new-comers

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

# Operational CRM - Israeli Market Positioning 1Q12



# CRM Selected Wins during 2011/1Q12 – Partial List of project wins +(implementers)- part 1

- ▲ **Siebel:** Clalit (CRM+UCM MDM) - Yael, Menora (CRM+UCM) - Taldor, Pemi Premium (Unitask), Bank of Jerusalem (Taldor)
  - ▲ **Upgrades/expansions:** Strauss-water
- ▲ **SAP CRM:** Gilat (Advantech), Yes, Maccabi, Telit (sales), Nemat Haifa (marketing), Machon Hatkanim,
  - ▲ Upgrade: Cellcom (Ness), Telit (Ness), Bank Hapoalim (Ness), Sonol (Ness), Scope
- ▲ **Salesforce:** Delek Group, Amiad, Verint, Shilav, Kensho, Netvision (Sales), Hilat Communications (Service), Nisco, Buy2, Eliyahu Finance, Tamir Fishman, Mediamind, Alvarion, Zim, Elbit Imaging, M. of Health, Manpower Israel, Medics (One1), Capital (One1), Attunity (One1), Success Charging (One1), Conduit (One1)
- ▲ **Pivotal:** H.Y Electronics. Raanana municipality, Milgam – collections center, upgrade - Ambar
- ▲ **Peoplesoft:** Expansions and projects in Bezeq, HOT, expansions and upgrades in Mifal Hapais, O12, Mimun Yashir, Netvision, Mataf, IDF
- ▲ **MEGACenter:** Bank Yahav

# CRM Selected Wins during 2011/1Q12 – Partial List of project wins +(implementers)- part 2

- ▲ **Microsoft Dynamics CRM:** YES (Elad + Convergys); Migdal (Matrix); Egged; Ministry of Health; Ministry of National Infrastructures; The Jewish Agency – Masa Project – Taglit (Malam-Team); Maccabi – Smoke prevention cc; GIF (Malam-Team), Enforcement and Collection Authority; Hanita Coatings; IKEA-Blue Square Furniture; Kenes International; Red Optical Networks; Zannex; Meitav Investment; Beer Sheva Municipality; Yaar-Holdings; Knowledge4All; Michlol; Sonol; Isred (Matimop); Kanit Investment; Taglit; Ashdod Municipality; Moto Media; Wrnty; Barzilai Design; PRS Mediterranean; Sheva Medical; Data Media direct marketing; Mer Group; Leverage; Mediton medical centers; German Israeli Foundation; Chasdei Lev; Netafim; Datamap GIS; Tera Sky; Mantis Vision; Keshet; Brio Software; 10 Tix; Engineering IL; Comandsense; Newpark; Waterfall security; PRS; Talpiot community; Israel Today (Malam-Team); Bank Leumi Romania (Malam-Team); Mey Eden global sales (Malam-Team); Jerusalem municipality (Malam-Team); El Al CC (Malam-Team); M. of Health – XRM; M. of Health – Kol Habriut (Elad); DSNR – XRM; Levrait – XRM; Prakitut Hamedina – XRM; Madanness – XRM+CRM (Matrix)
- ▲ **Live (SaaS) clients:** Massa Taglit (Malam-Team); Dead Sea Works; Engineering union; M. of Internal Affairs – Combined with Azure (Malam-Team); Rappaport (Malam-Team); M. of Science (Malam-Team);

# CRM Consultants in Israel - Partial List

## (Alphabetical order, not a ranking)

- ▲ **Accenture**
- ▲ **Alternative**
- ▲ **B-Pro**
- ▲ **Deloitte Touche**: Strategy, business case
- ▲ **IT solutions**: CRM & Billing
- ▲ **Luria**: Contact centers
- ▲ **Matrix (Beyond IT)**
- ▲ **Meteor**
- ▲ **Ness-Gilon (Synergy)**: Loyalty, Customer Analytics & Social CRM
- ▲ **Nugami**
- ▲ **Sensecom**: Contact Centers
- ▲ **TCS Israel – Tata**
- ▲ **Widelink**
- ▲ **Value Plus (SAP)**
- ▲ **Several other independent advisors**



Engagement

E-business

Experience



# 2012 game changers :



## New rules for the “web”

# What are websites in 2012?

Websites are becoming the main engagement and experience platform with customers.

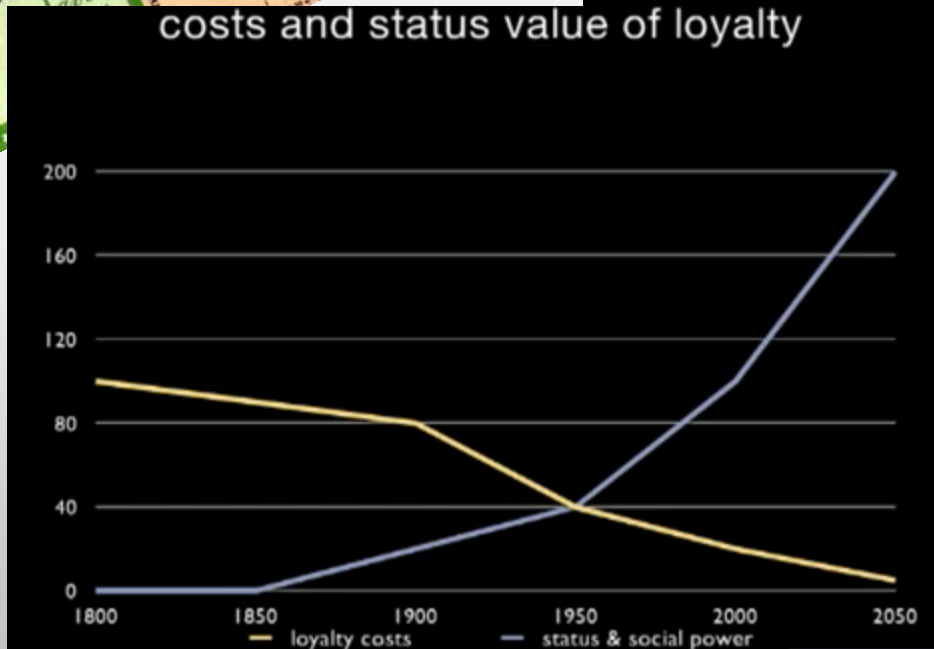
Enterprises will try to turn websites into a fun place that customers will want to spend hours in.



# Fun creates loyalty



costs and status value of loyalty



Source: Gabe Zichermann <http://www.youtube.com/watch?v=a2LDip9HPwY>

# Web trends: gamification

## Gamification of websites:

- Competing against others
- Hierarchical levels of games
- Winning awards or product discounts
- Website visit is fun, like a game



Source: Soapcreative.com

The user reads product announcement, watches video demonstrations, makes comments, sends likes, and is being rewarded points that can be redeemed

# SaaS international gamification tools:



Use game theory to improve members' engagement and participation, tracking their progress and achievements each step of the way.



- Engagement
- Loyalty & Commerce
- Employee Motivation

# NBC website using gamification

log in

earn points

get rewards

mynbc log in

Email/Username:

Remember me

Sign in

75

Hubba Hubba

We've collected photos of your favorite Salem hunks just in time for Valentine's Day! Comment on the photo of Chad...

Go

Parenthood Is... T-Shirt

Parenthood is... Having 911 on speed dial...

Go

earn more

Register for myNBC

100

ENGAGEMENT

LOYALTY

REVENUE

Gamification is not just about putting crappy badges on your crappy website

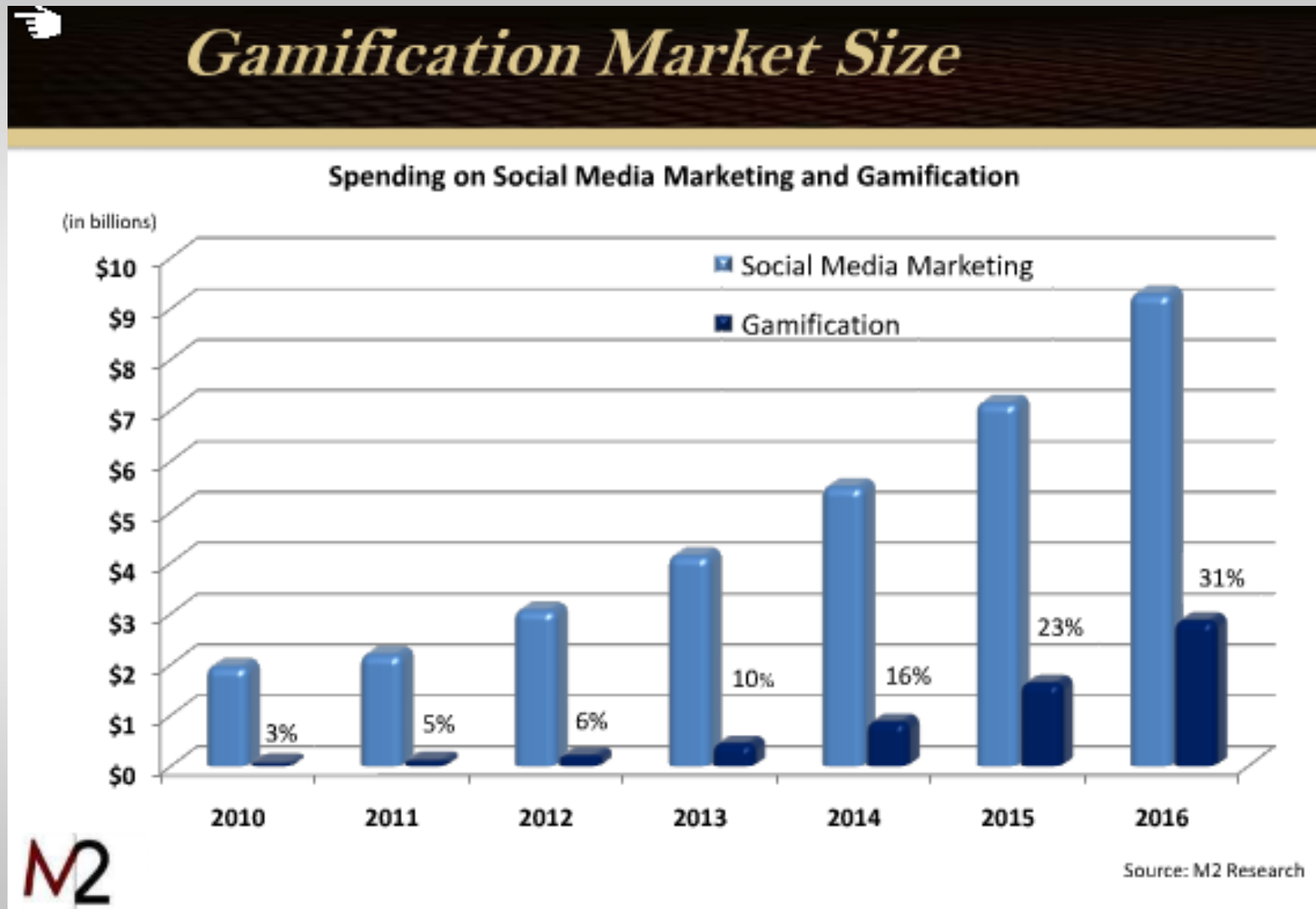
- Gabe Zichermann

Sweeps: Samsung Galaxy

5 Points

5 Points

# Gamification spending (Source: M2 Research)





Time to restart your website



# Websites are apps.



# Physical web (Source: MCorpConsulting)

“The ability to help your customers remotely link to, browse and utilize the physical world like they do the web”.

Customers can “bookmark” their favorite places or shops, keep track of real things (like the location of their car). This opens up immense new service options limited only by your imagination



Source: [http://www.slideshare.net/Michael\\_Hinshaw/mcorp-customerthink-webinar](http://www.slideshare.net/Michael_Hinshaw/mcorp-customerthink-webinar)

# More digital trends affecting your web strategy:



## Connected TV

“TV is a mature but rapidly-changing market. With the advent of IP-based devices, connected TVs are progressing at a fast pace and traditional TV broadcasting is quickly evolving into a more immersive experience where users can interact with rich applications that are at least partly based on Web technologies”.

(Source: W3C)

# More digital trends affecting your web strategy:

## Retail is not a place anymore

Retail goes digital, doing what, really well?

Loyalty king Tesco will strike hard, so will airlines.

Google wallet

The digital wallet is the new loyalty hub.

Long tail of 'stuff.'

Yelp

Groupon is onto something big. Context based deals based on the here and now - brilliant!

Have your favourite catalogues always with you. Google becomes a bargain hub.

TESCO CLUBCARD Every little helps!

clickandbuy

PayPal Wallet

V.me by Visa

DISCOUNT 67%

Buy Now!

- 2009 Best of LA Award
- Small classes, personal attention
- Blends ballet, Pilates & weights
- Good at three locations

Source: <http://www.slideshare.net/fjordnet/fjord-digital-trends2012final>

# Retail embraces social media

2011 Retail companies acquired social media companies:

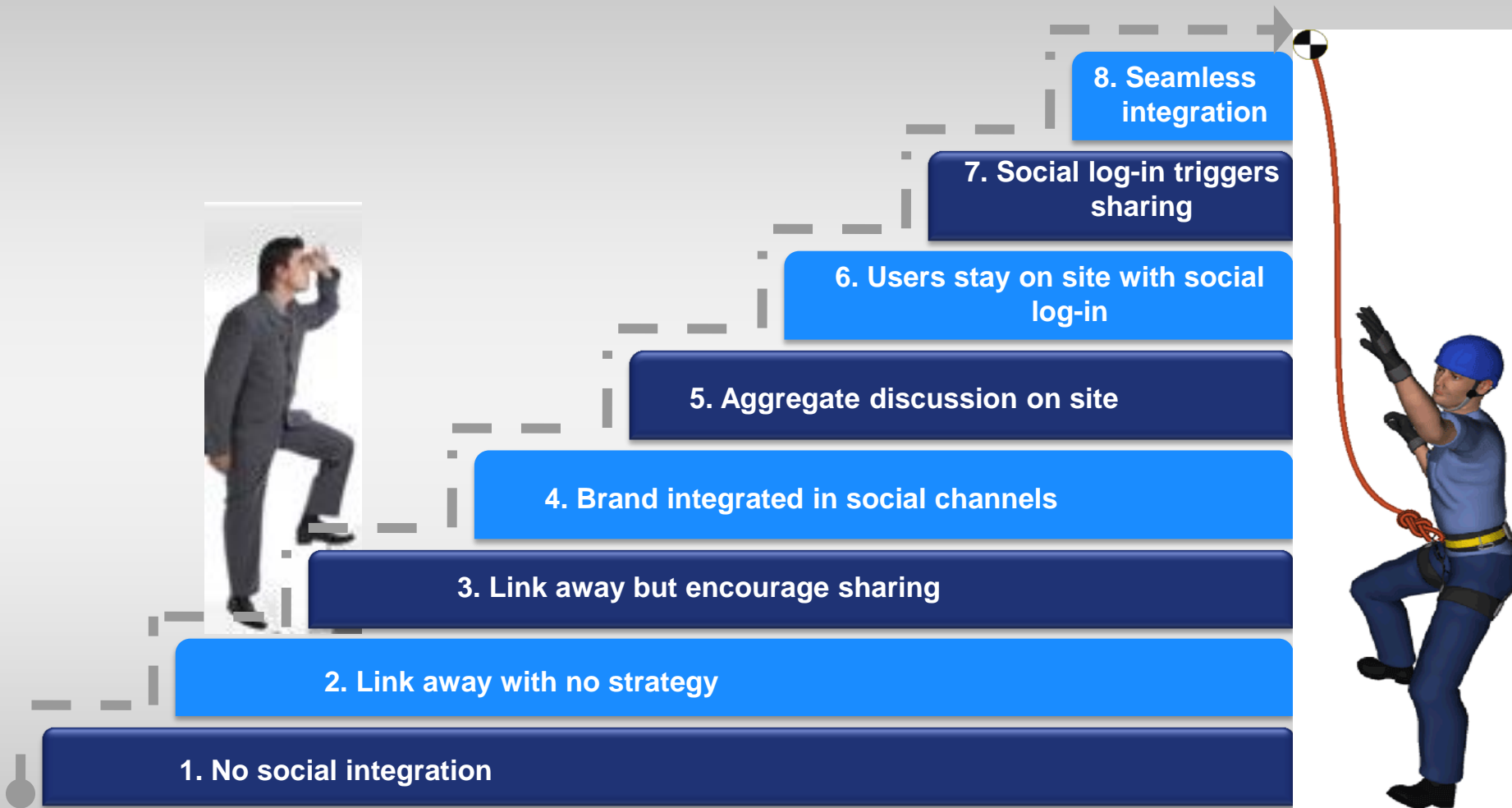
- Tesco acquired BzzAgent
- Walmart acquired Kosmix

## *Why?*

- ✓ Intent-based inventory management
- ✓ Loyalty programs
- ✓ Brand monitoring
- ✓ Engagement
- ✓ Social commerce



# Maturity model for Social media integration



- Source: <http://www.web-strategist.com/blog/2010/05/19/slides-roadmap-for-integration-of-social-into-your-corporate-website/>

# Fanzila (Israeli rep: Ness-Pro)

1. Content Management for Facebook
2. Social CRM – Collects facebook data from Fans, and allows slicing and email marketing according to fan interests

## UPGRADE YOUR FACEBOOK PAGE

BLOG FORUM VIDEO  
COMPETITION TWITTER  
WIKI HOME PAGE  
GALLERIES

Browse the Apps



# The attention economy

CartoonChurch.com

We've gone from being exposed to about 500 brand messages a day back in the 1970s to as many as **5,000** a day today.

Jay Walker-Smith  
Yankelovich Consumer Research

See: 5,000  
Engage: 76  
Recall: 12  
Act on: 5

Yankelovich Consumer Research



you  
have to  
be the  
**0.1%**

Yankelovich Consumer Research

Source: <http://www.slideshare.net/jess3/the-practitioners-guide-to-creating-content-like-a-publisher>



*From WCM to...*



Warning!  
Buzzword ahead

*DCM:*

*Digital Content Management*

# WCM (Web content management) trends:

WCM tools are no longer just about content. WCM tools include:

- Content creation tools (authoring and approval WF)
  - Content management tools – library, authentication
  - Web analytics
  - Digital Content Management (not just web)
  - Rich media management (DAM)
  - Multi device consumption support
  - Standards support: CMIS, WSRP, HTML5
- } *New stuff*

Website management try to provide **web customer experience and engagement management platforms** but no one tool does it all. Enterprises will still need to use several different tools

Israeli WCM market behaves very differently than worldwide market. Leaders abroad – Adobe (Day SW), Oracle Web Center (Fatwire, ATG), HP (Autonomy/Interwoven), Open Text (Vignette), SDL Tridion, Sitecroe.

## In Israel – it's a sharepoint-oriented market



# WCM/ External Portals tools: Players in Israel

Company	Product Name	Integrators
Matrix	Vignette (acquired by Open Text)	Realcommerce, Matrix
Microsoft	MOSS	eWave, Netwise, Matrix, Malam-Team, Advatnech, Elad, Bynet SW, HP, Hilan, Consist, Yael, Tvuna, One1, Byon, Aman, Realcommerce, Ness and more...
SPS/CMS Migration tools: METAllogix (Bynet SW), MMF (Malam-Team), Matrix, eWave Sharepoint.X etc.		
IBM	Websphere Portall	Matrix, Risotech-Elad, IBM, ONE1, SPL-Idor, KITS-advantech, Midlink, C-soft, Taldor, Web Tech
Bynet	Sitecore	Bynet
	EZ Content	Bynet
	WebTrends (Web analysis)	Bynet
Matrix Digital	Scepia tools	Matrix Digital
Realcommerce	RealCMS	Realcommerce
Netwise	EPIserver	Netwise
	Tridion	Netwise
	Telerik (Sitefinity – product)	Netwise
Consist	CMS (PHP)	Consist
eWave	eGenCMS 2.0	eWave
Interwoven	Xioma	Xioma
Ness	Choradiant web analysis	Ness
Oracle Israel	Oracle Web Center	Matrix, eWave, Coral, Taldor, Advantech, Unitask, Malam-Team - Stellent, Qesem, ONE1, Mckit, HP
SAP Israel	SAP Portal	IBM, One1 (Xact), Ness, HP, Taldor, Malam-Team, etc.

# Portals: 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	Netwise
Liferay	Malam-Team, Matrix
Nopcommerce (open source e-commerce, shopping cart)	Netwise

# Web Analytics

Company	Israeli specialists (partial list):
Web Trends	Bynet
Clicktracks	Consist
Google: Urchin (Google on premise version) Google Analytics	
IBM – Unica web analysis	Gstat
Coradiant (non intrusive)	NessPro
ActiveInsight	ActiveInsight
Piwik (open source web analytics)	

# External Portals –2011-1Q12:

## Partial List of selected wins +(implementers)

**MOSS:** Supersol - new Commerce site (Netwise), Better Place (Realcommerce), IEC (eWave), Bank Mizrahi (eWave), Bank of Jerusalem (eWave), Ayalon Insurance (eWave), Bank of Israel (Bynet SW + Taldor), Mivtach Simon – mobile (Netwise), Leumi-card (Matrix), Zim (Matrix), M. of Justice (Matrix), M. of Education (Matrix)

**Websphere:** Mataf – Bank BeinLeumi (Matrix)

**Liferay (open source):** Bezeq Beinleumi (Malam-Team)





**MCx (Matrix):** Bank of Jerusalem, Bank Mizrahi

**ACx (Matrix):** Castro, Mimun Yashir, Union Bank site, Machon Hatkanim, Ophran (commerce module), Eged Tiur, , TV

# The importance of website compatibility

Desktop Market Share - 90.8% 

## Desktop Browser Share

	Internet Explorer	53.0%
	Firefox	20.9%
	Chrome	18.9%
	Safari	4.9%

Yet many sites  
only run on  
explorer!







NETMARKETSHARE™

Source: <http://www.netmarketshare.com/>

Mobile Market Share (including Tablets) - 8.9% 

## Mobile/Tablet Browser Share

	Safari	54.9%
	Opera Mini	19.6%
	Android Browser	17.8%
	Symbian Browser	2.8%





% websites using HTML 5 amongst  
the 100 most popular websites



Source: <http://www.slideshare.net/ThibautLoilier/digital-trends-2012thibaut-loilier>

# Big Data & analytics



# A year of new marriages

**Infrastructure**

**Applications**



**Structured  
data**

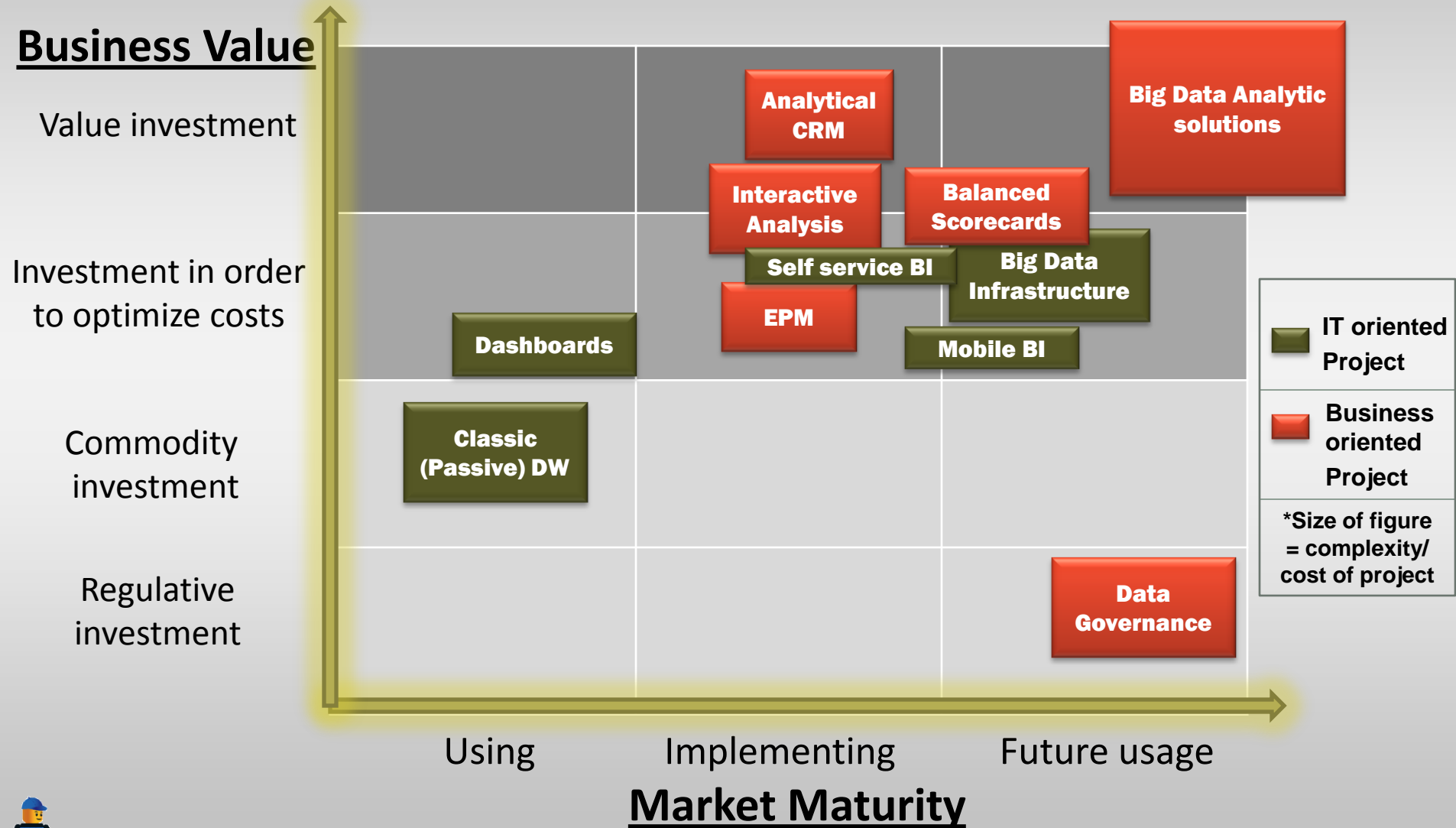
**Unstructured  
data**



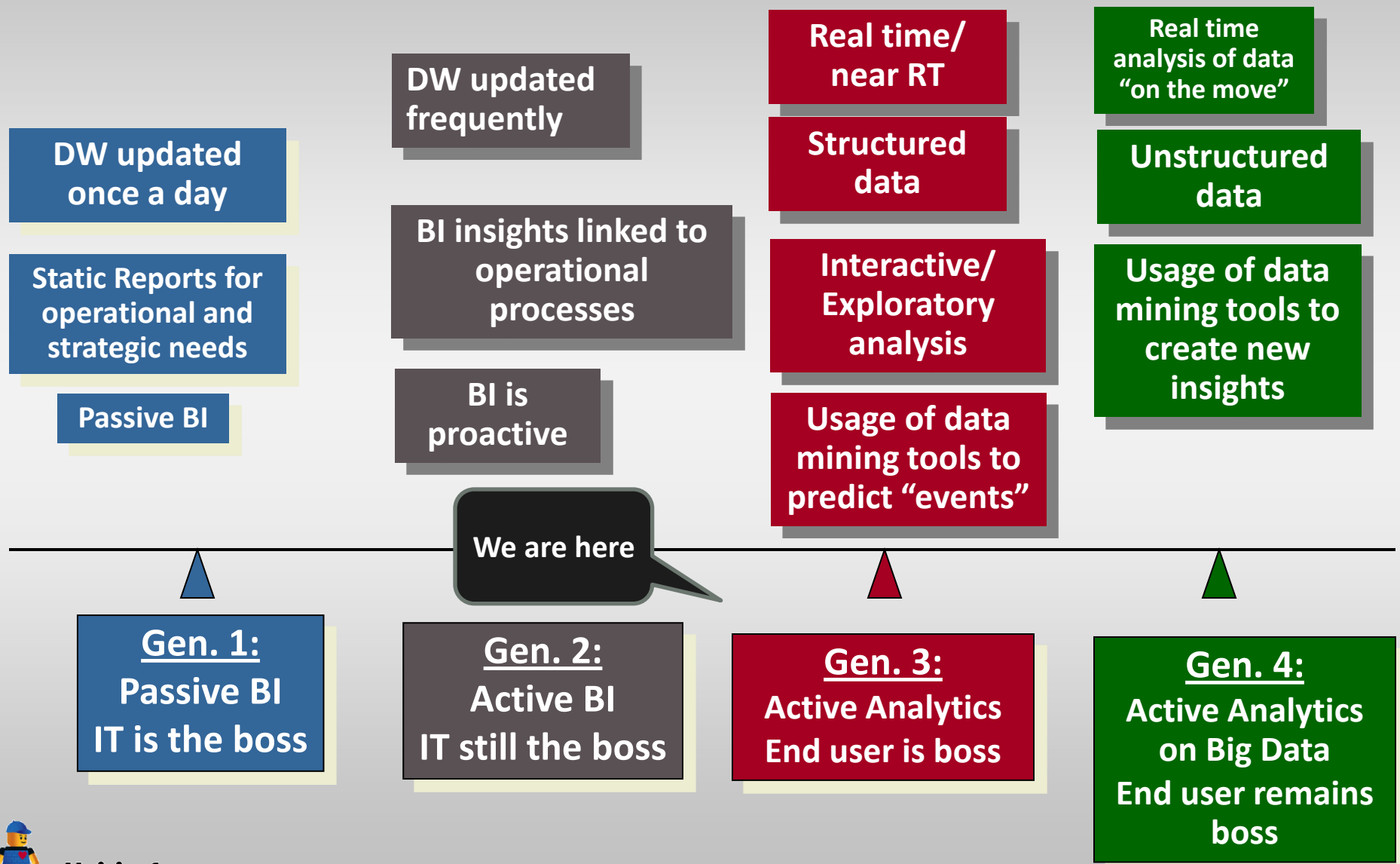
# Big data meets analytics



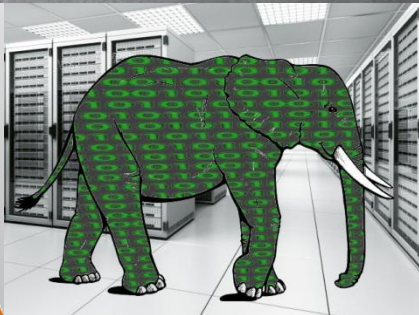
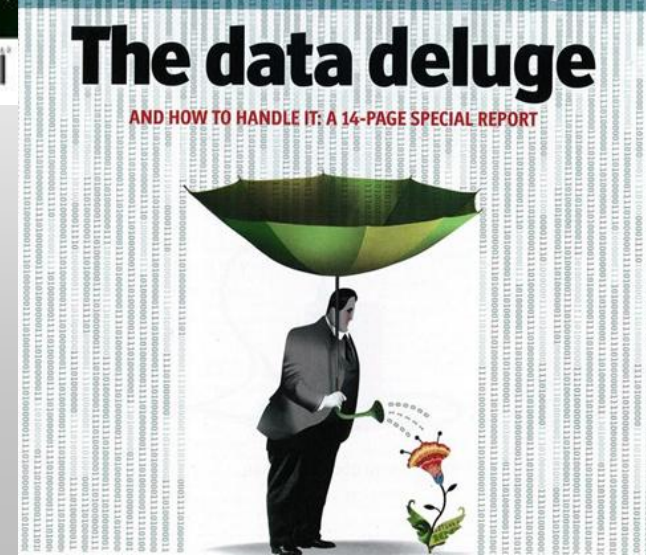
# BI & Analytics Maturity Model



# Analytics & BI Generations



# Big data = NEW Knowledge



# 640 GB of data transferred each minute

## What Happens in an Internet Minute?

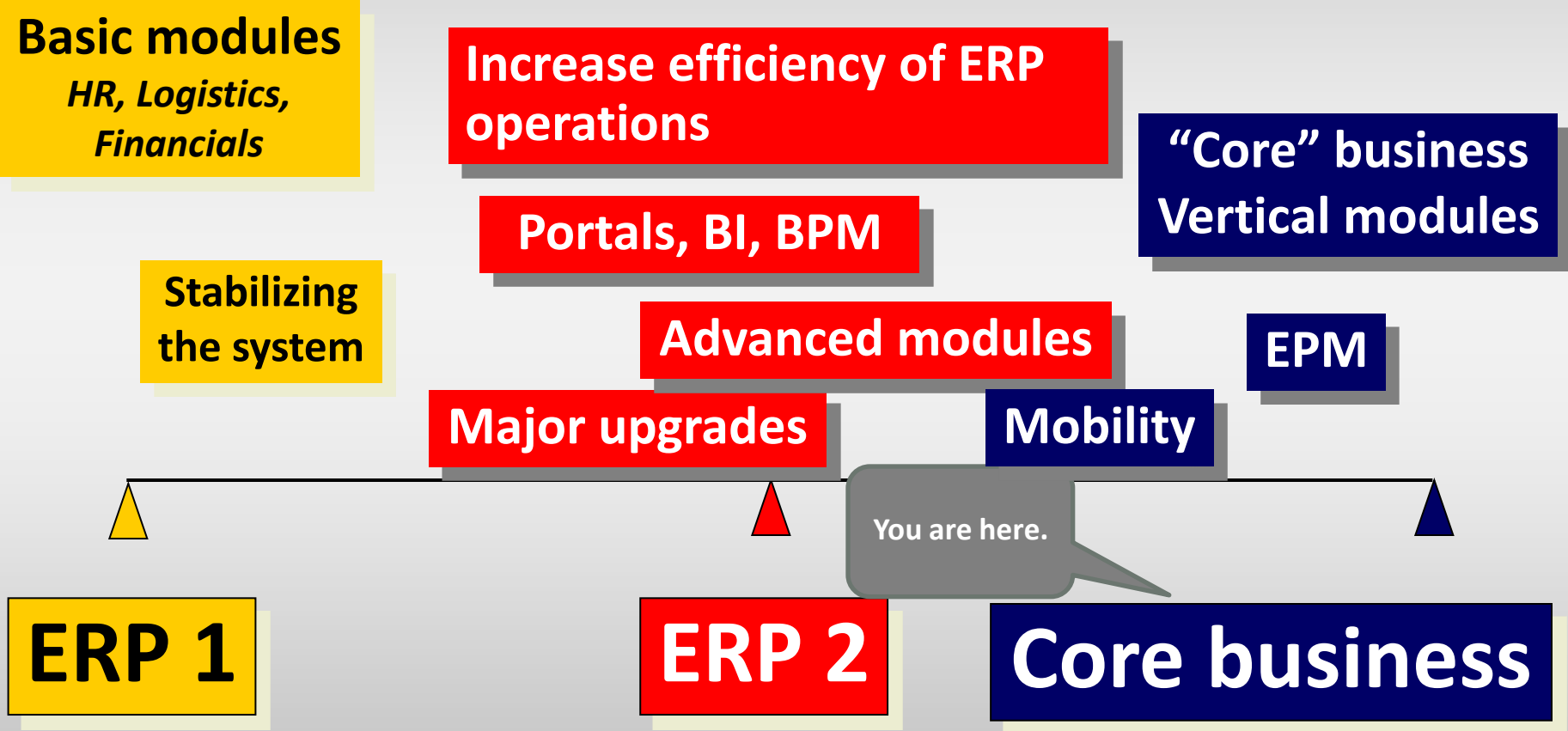


## And Future Growth is Staggering





# ERP Life Cycle



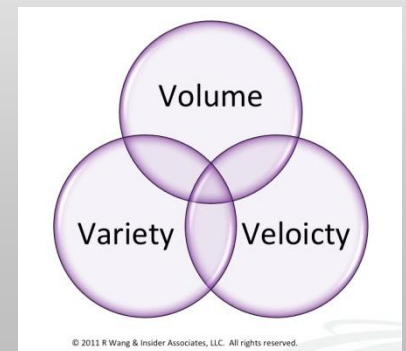
## Unstructured data sources:

social networks, retail and supply chain sensors, traffic and transit system sensors, smart meters and power grids, medical monitoring devices, communications networks, financial trading and transaction systems, security and risk monitors, and national intelligence agencies.

# Big Data Definition – 4 V's (or more...)

- **Volume** – tens of TBs and more
- **Velocity** – the speed in which data is added – 10M items per hour and more. And the speed in which the data needs to be processed
- **Variety** – different types of data – structured & unstructured. In many cases deals with internet of things, social media, but also with voice, video, etc.
- **Variability** - able to cope with new attributes and changing data types – without interrupting the analytical process (without “import-export”)
- Other optional V's - validity, volatility, viscosity (resistance to flow)

Source: <http://www.computerweekly.com/blogs/cwdn/2011/11/datas-main-drivers-volume-velocity-variety-and-variability.html>

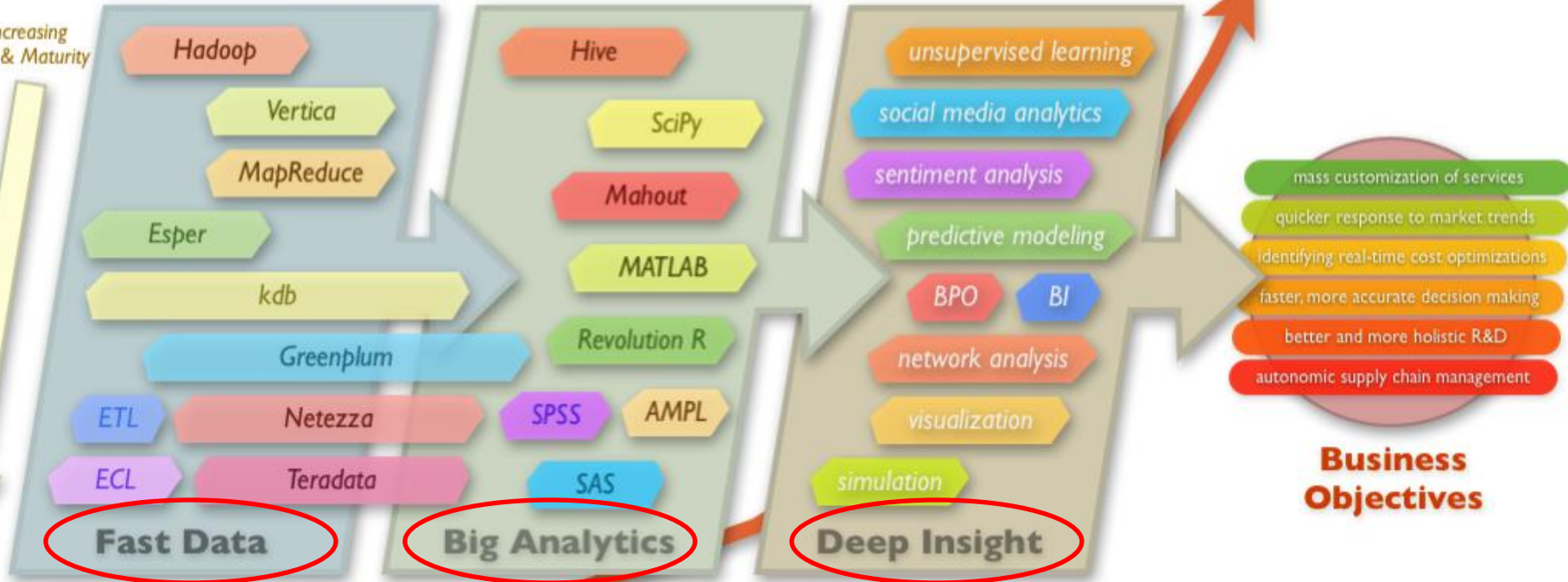


# 3 Parts to Big Data



## Big Data: The Moving Parts

Increasing Age & Maturity



From <http://blogs.zdnet.com/Hinchcliffe>

the growth of data will be exponential for the foreseeable future

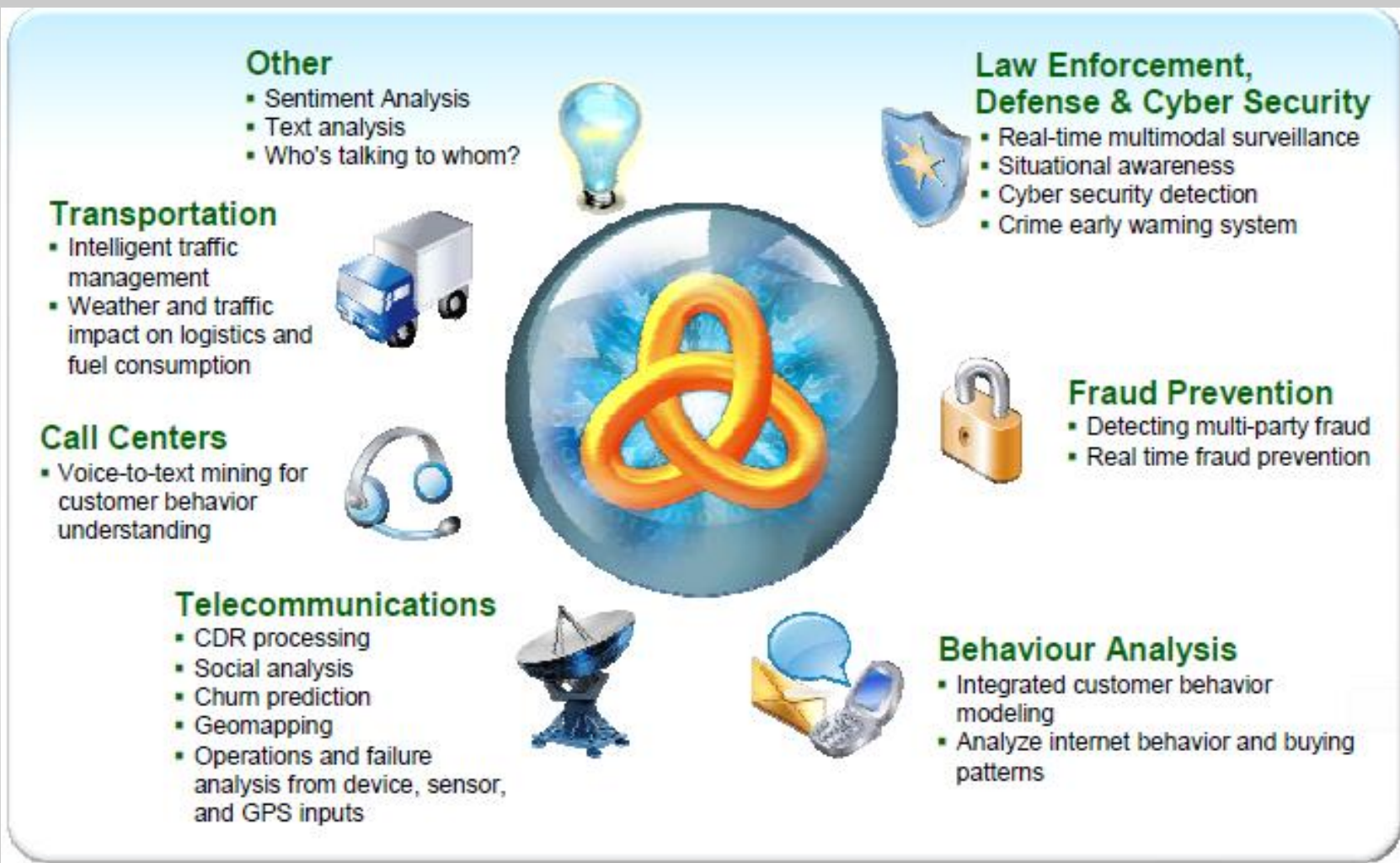


the amount of data stored by the average company today

**Big data is the launch point for a new breed of analytic applications**



# Example of Big Data analytics usage (Source: IBM)



# Example of Big Data analytics usage (Source: SAS)

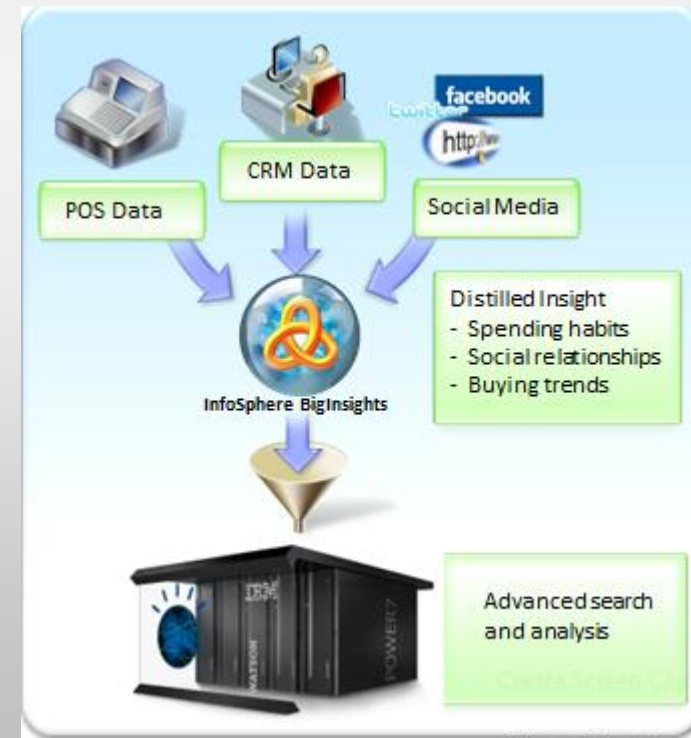
Industry	Business Issue
Insurance	Telematics, Claims Analytics, Ratemaking, Catastrophic Modeling
Banking	Customer Analytics, Dynamic Pricing, Fraud Scenarios and Exposures
Telecommunication	Collection Scoring, Bill Shock Avoidance, Network Detection and Repair
Government	Tax Fraud/Collections, Criminal 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

**Big data analytics = Analytics on Steroids**



# Examples of Big Data analytics tools

- Ness TSG (analysis of external data sources), Sentiment analysis as a service
- SAS
- IBM “BigInsights”
- SAP HANA applications
- Teradata (acquired Asterdata for unstructured content)
- Datameer (Hadoop based BI)
- Karmasphere (+SQL interface)
- Digital Reasoning – analysis of text based communications



Source: IBM



# Big data market (source: Wikibon)

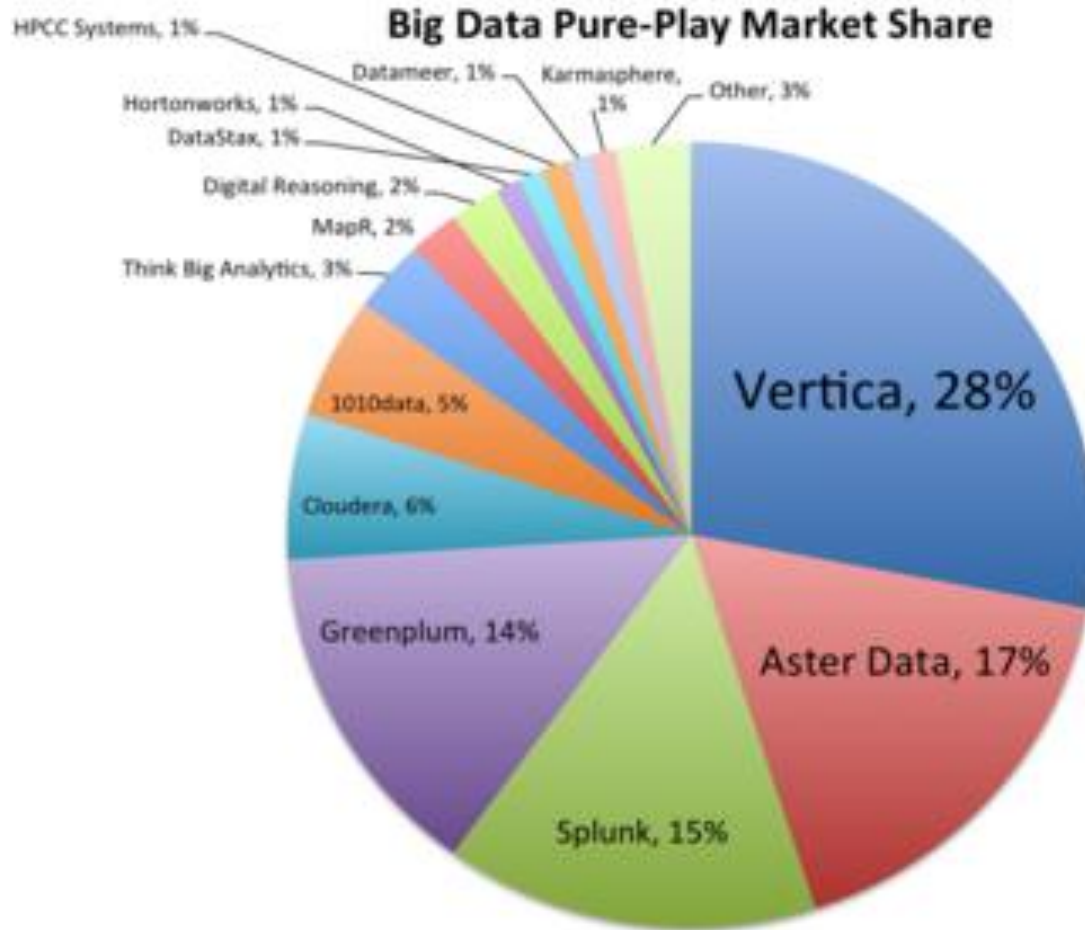


Figure 3 - Source: Wikibon 2012



# Big Data

Big data Infrastructure:  
storing and processing  
many vendors, projects

Big data Analytics:  
putting the data to use  
Attivio, Autonomy+Vertica (HP), SAP, IBM,  
Oracle, NCR  
Focus should shift to analytics

# New role in the analytics world – Data Scientist

Ability to analyze large amount of data

Ability to explain the significance of data

Data mining & statistical skills

Data mining & statistical skills



Algorithms & coding

Business optimization

Problem solving

Machine learning

I'm not a statistician.  
I'm a data Scientist

# 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 Address

### HTML to Story

API: [/html2story](#)

Takes an HTML document representing a news article or text.

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

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

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

### Text to Times

API: [/text2times](#)

Spots text fragments

Try it for yourself. C

Find Times

# Big Data Sis in Israel – Partial list:

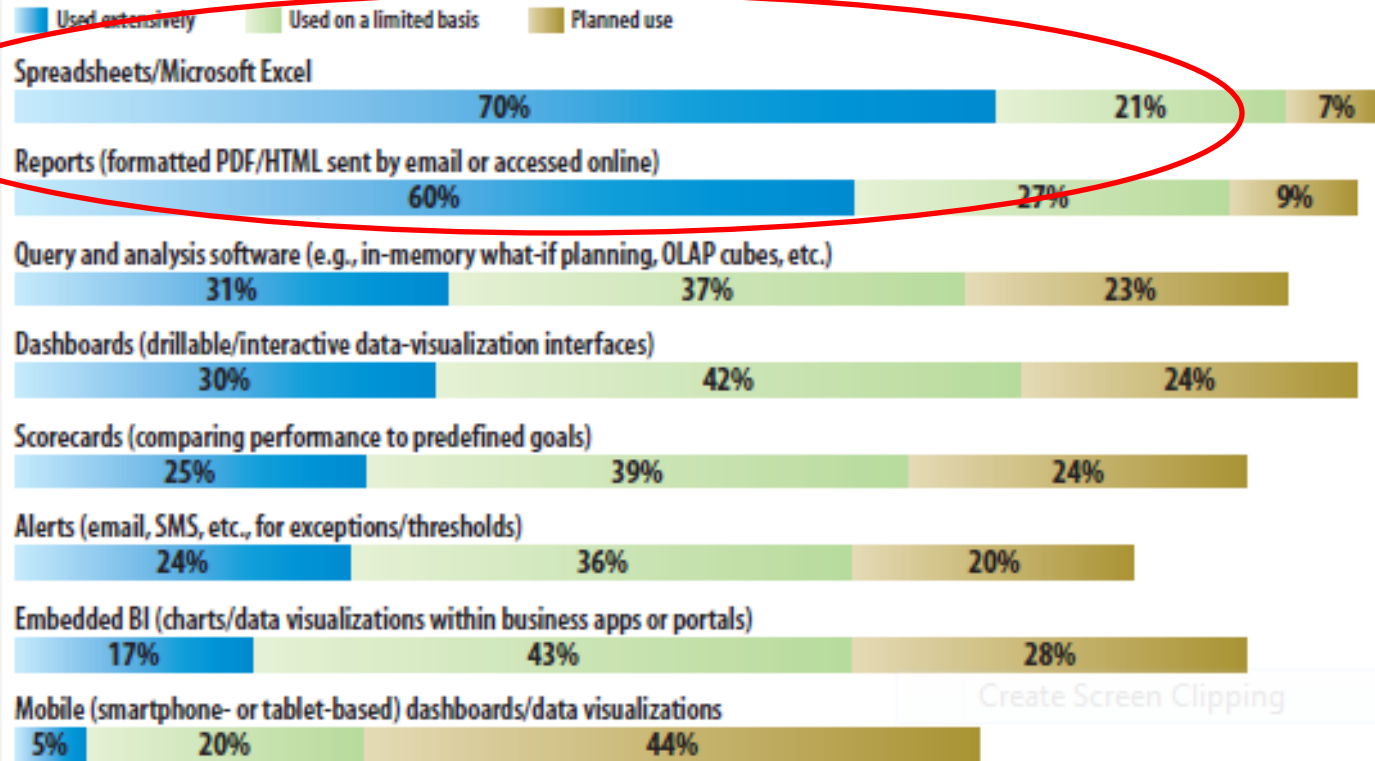
- Vision BI
- Ness-Gilon (eBay, S&P, GM, Franklin Tempelton, Canadian Tire, IDF)
- Taldor – 3BASE (Pitbug, Navitrio, Quicklizard, Mediamind, Conduit, Kontera)
- Malam-Team
- One1

# Reality check:

## we are still stuck with spreadsheets and static reports

### Extent of Technology Use for Sharing BI/Analytic Insights

To what extent are the following technologies used to share BI/analytic insights within your organization?



Base: 414 respondents using or planning to deploy BI, data analytics or statistical analysis software

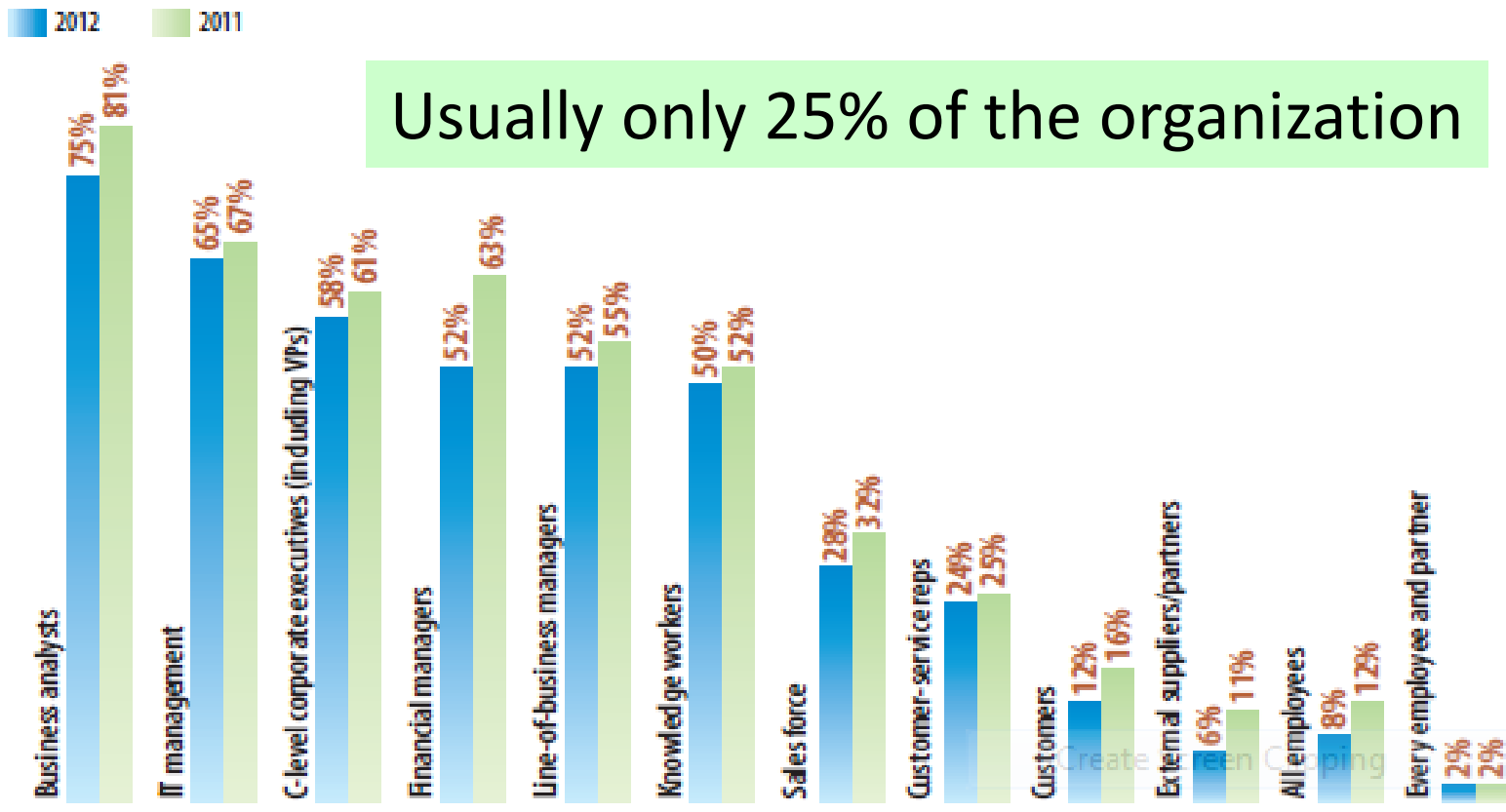
R3351111/3

Data: InformationWeek 2012 Business Intelligence, Analytics and Information Management Survey of 542 business technology professionals, October 2011

# BI is still not for everyone

## User BI/Analytics Access

Which of the following users have access to or utilize BI/analytics today?



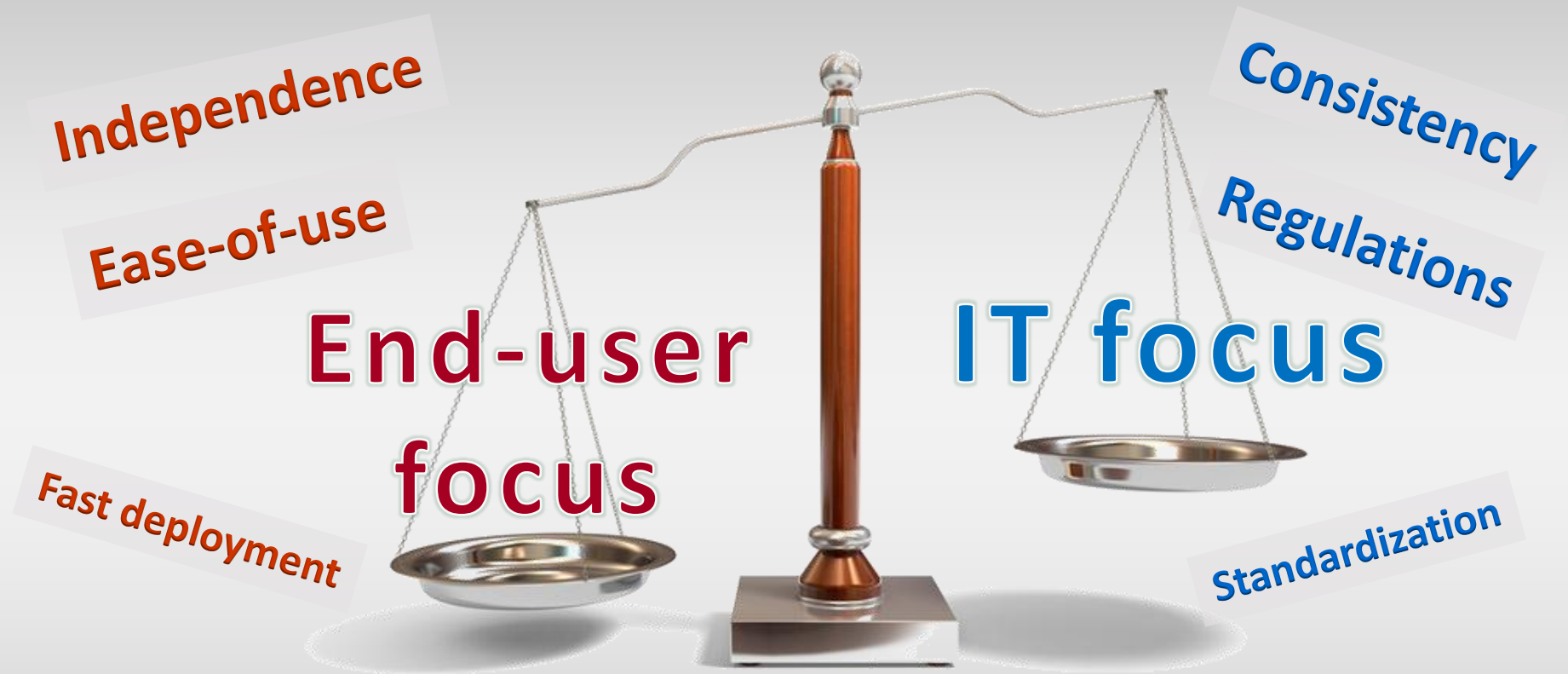
Note: Multiple responses allowed

R3351111/2

Base: 414 respondents in October 2011 and 410 respondents in September 2010 using or planning to deploy BI, data analytics or statistical analysis software

Data: InformationWeek Business Intelligence, Analytics and Information Management Survey of business technology professionals

# Focus shift: now the end user decides



Self service BI - independent  
Easy and “cool” visualization  
Interactive exploratory analysis  
Fast response time

IT managed (and controlled) BI  
Consolidated data  
Single version of the truth  
Single integrated BI suite



# Data discovery



**Simple.**  
(...for the user, not for IT)

# But there is a cost (for IT to pay)

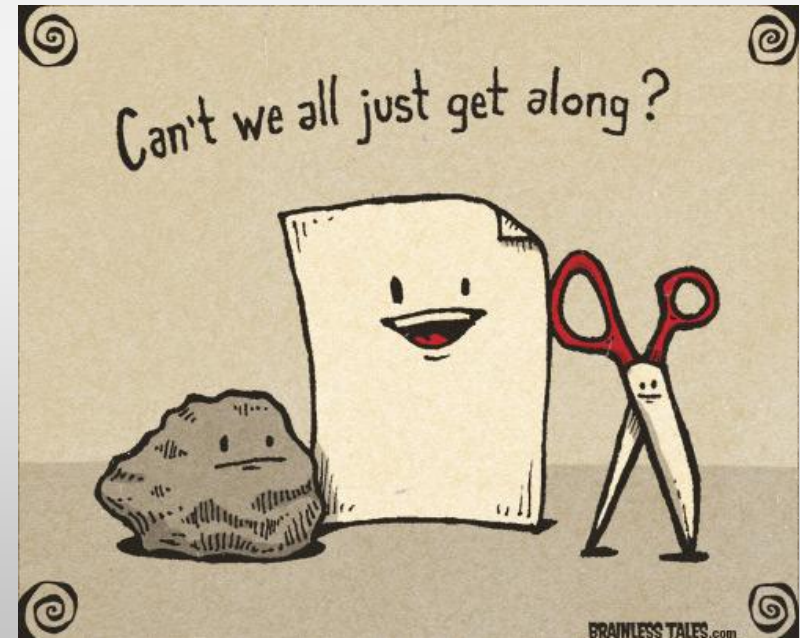
- Creates separate information “silos”
- Another “semantic layer”
- Separate from organization’s metadata
- Several versions of the truth
- An additional set of tools



# A new category for BI tools: Interactive Analysis

## 2 types of BI tools:

- Classic reporting & OLAP viewers
- Business Discovery user exploratory tools (Qlikview, Spotfire, Tableau...)




Source: <http://healthinreallife.blogspot.com/2011/10/why-cant-we-just-get-along.html>

# Most important application customers for 2012

2011 was a good year for CFO tools market

- Budget planning is back
- Reports consolidation
- Financial disclosure
- A few profitability projects & RFPs



Yeay! EPM tools  
are hot again



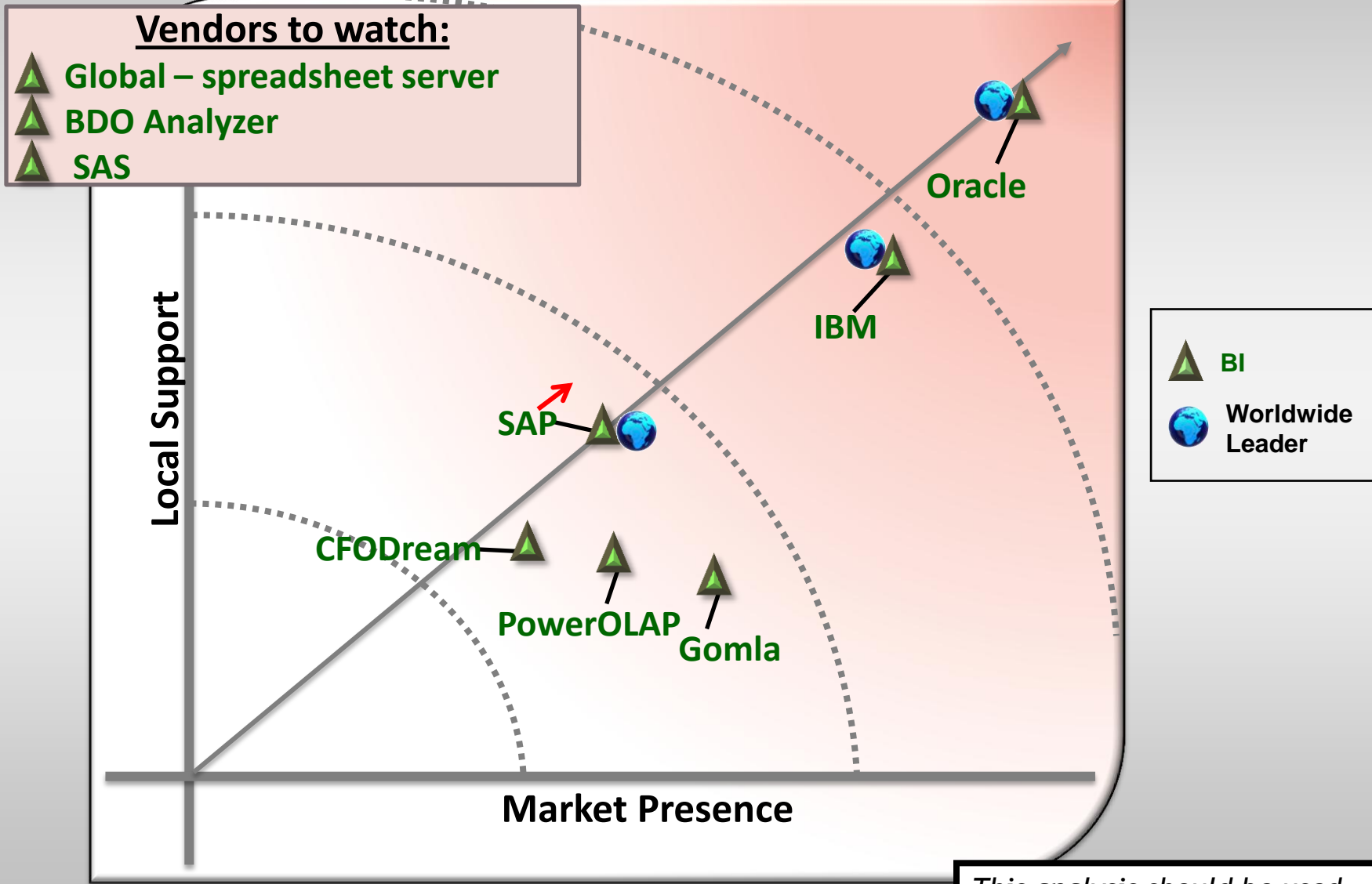
# EPM packages

## Budget Planning, report consolidation, financial disclosure

Package	Rep in Israel	Integrators
Hyperion - Oracle	Oracle Israel	HMS, Business & Decisions, Ness-Gilon, Oracle consulting, Malam-Team, One1Up
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
Power OLAP	Top-IT (Opisoft), Xioma	Top-IT (Opisoft), Gilon
SAS	Mia computers	Mia
CFODREAM	The 7 <sup>th</sup> Dimension	The 7 <sup>th</sup> Dimension
Global - Spreadsheet server	Yael software	Yael Software
Gomla (mainly Costing)	Gomla	Gomla
BDO Analyzer	BDO	BDO
Palo (open source OLAP)		Ness

# EPM tools

## Israeli Market Positioning 1Q12



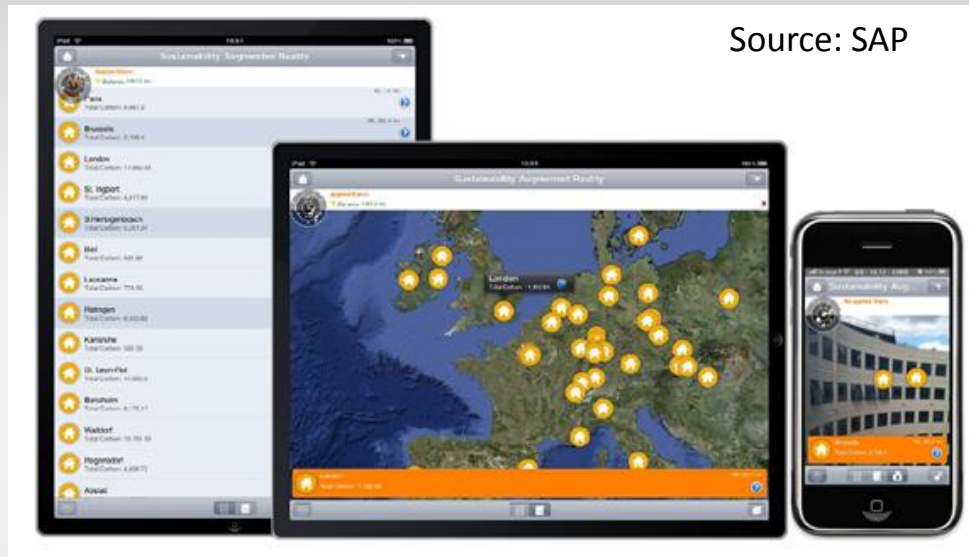
**BI and Mobile are the 2 top priorities for CIOs.**

**So... why isn't mobile BI a main priority?**

**Will 2012 finally be the year for mobile BI?**



What mobile BI can look like:



Mobile BI is not just “wireless access” to BI data. It’s a NEW and DIFFERENT delivery channel that should be optimized to provide **context, location and time meaning** to data and decision making

~40% of organizations plan to implement mobile BI during 2012  
(Source: Informationweek)



**During 2011** almost all BI vendors offered BI for tablets (mainly iPad, some Android)

**During 2012-2013** we will see organizations starting to use mobile BI **applications**.

Main challenges will remain:

- Security
- Vendors aren't providing FULL support yet (Android still not provided in many packages)
- BYOD, no standardization

# From mobile devices to mobile users .....



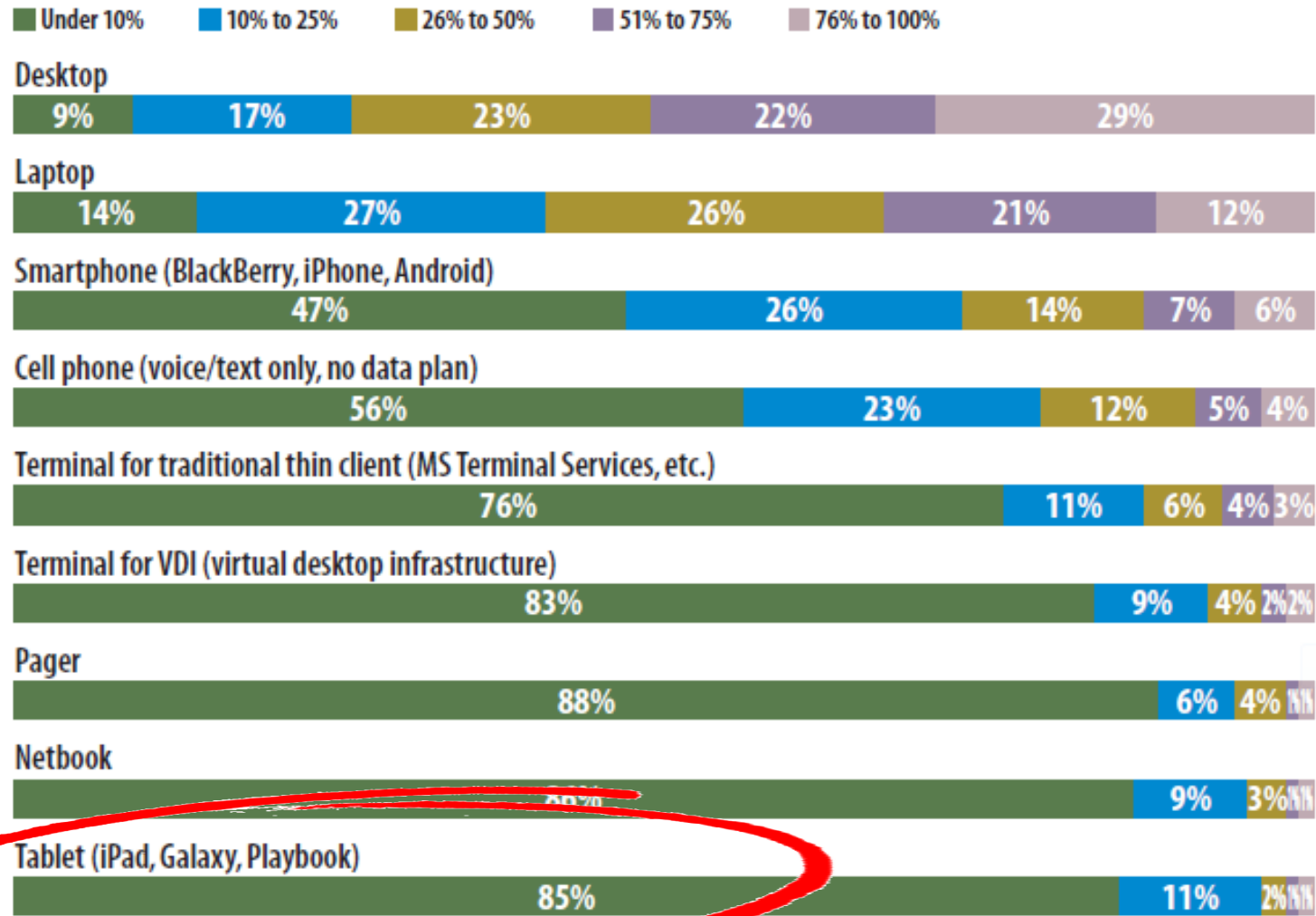
Mobility v1: serving many devices



Mobility v2: serving users in many locations with many devices

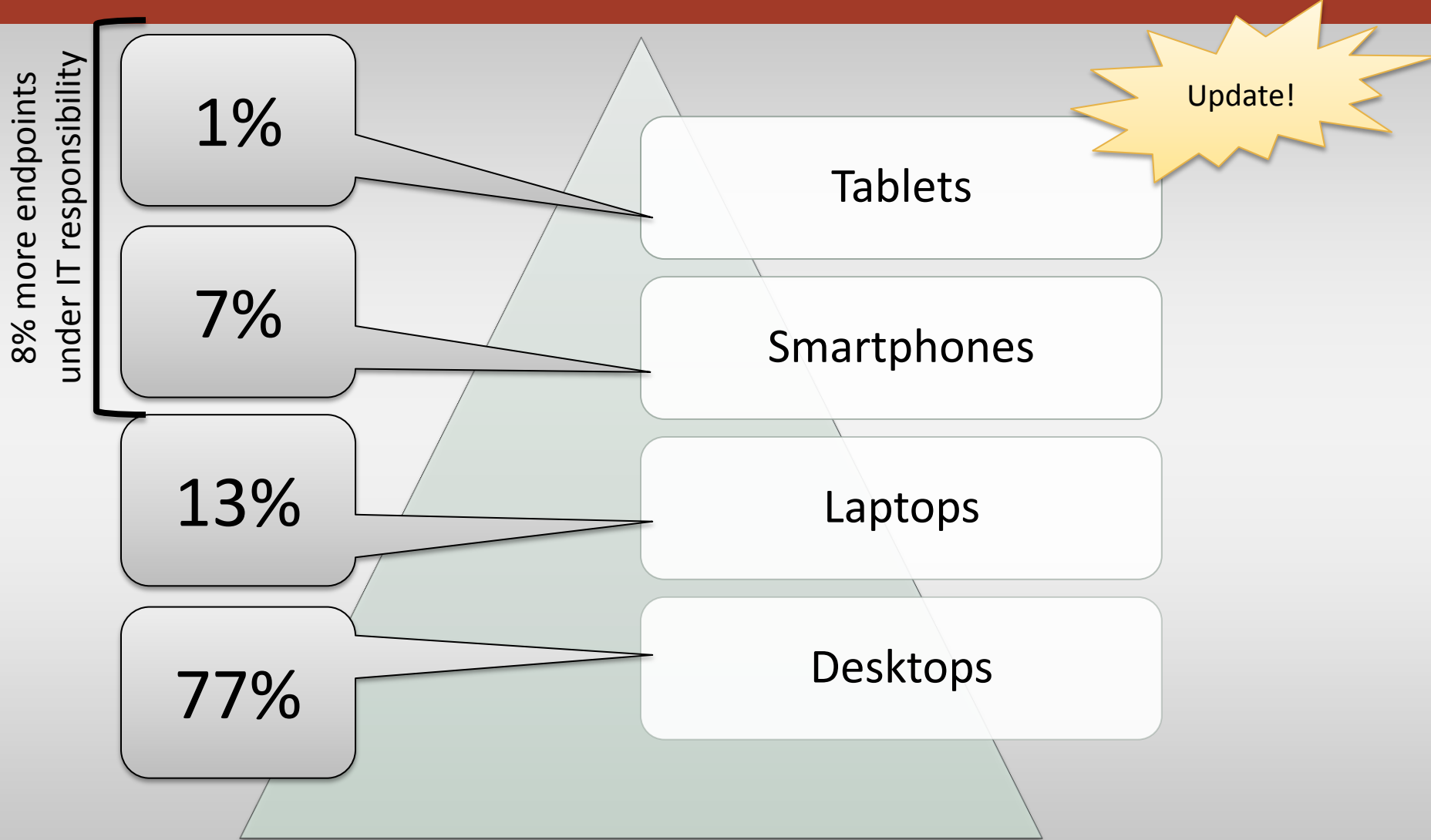
# In 85% of enterprises only <10% of workers have tablets

What percent of information workers are provided the following devices types by your organization?



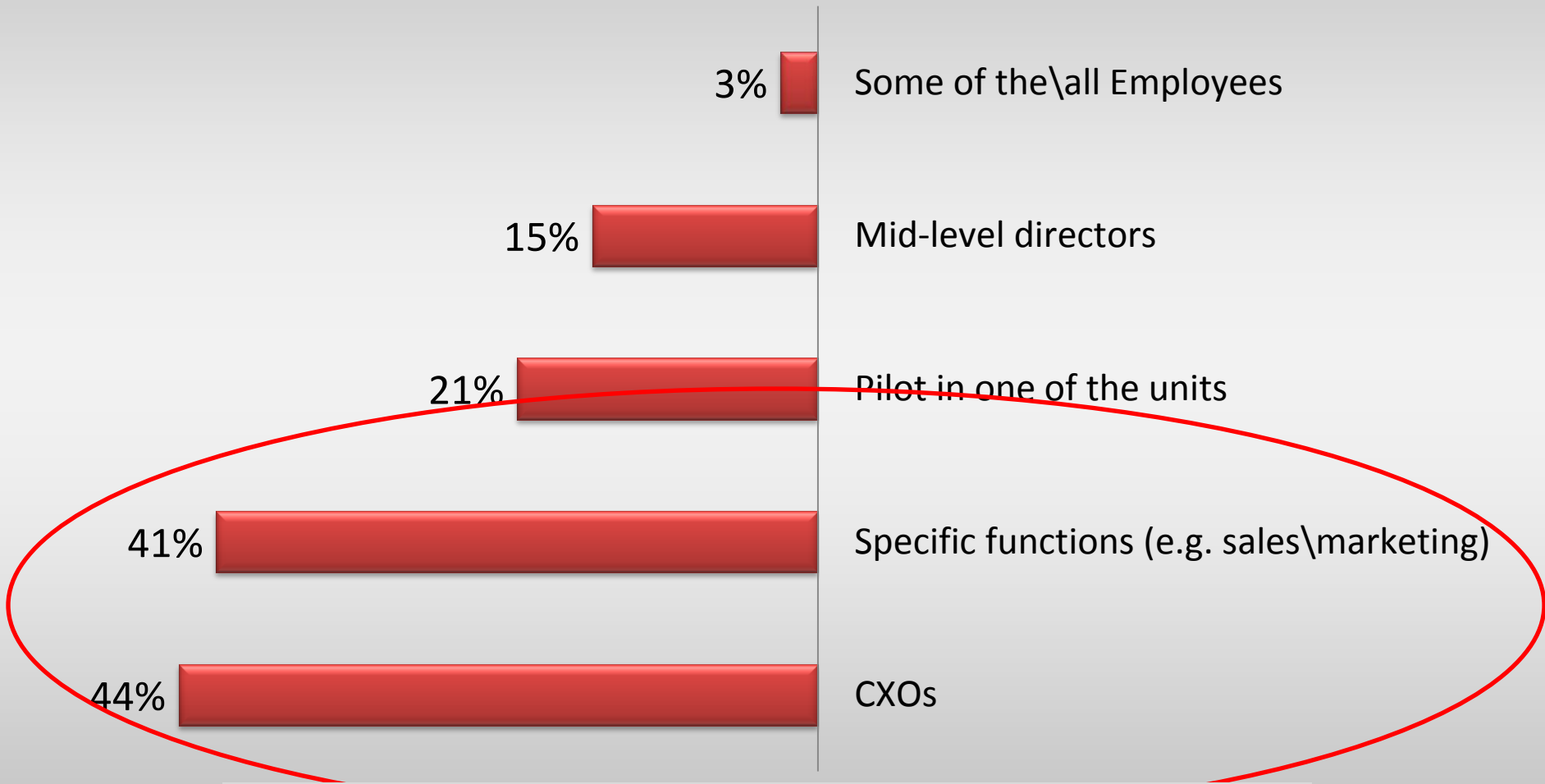
source: InformationWeek

# In Israel: 1%... Under IT's responsibility but growing



Source: STKI Feb. 2012

# Who Will Be Using Tablets? (Israel)



Source: STKI, Sep. 2011

# Mobile BI dedicated tools:

**Roambi.** (for iPhone/iPad)

**DSP**

DSPANEL (Microsoft mobile BI as web parts)

 **EXTENDED RESULTS**  
BUSINESS INTELLIGENCE SOLUTIONS

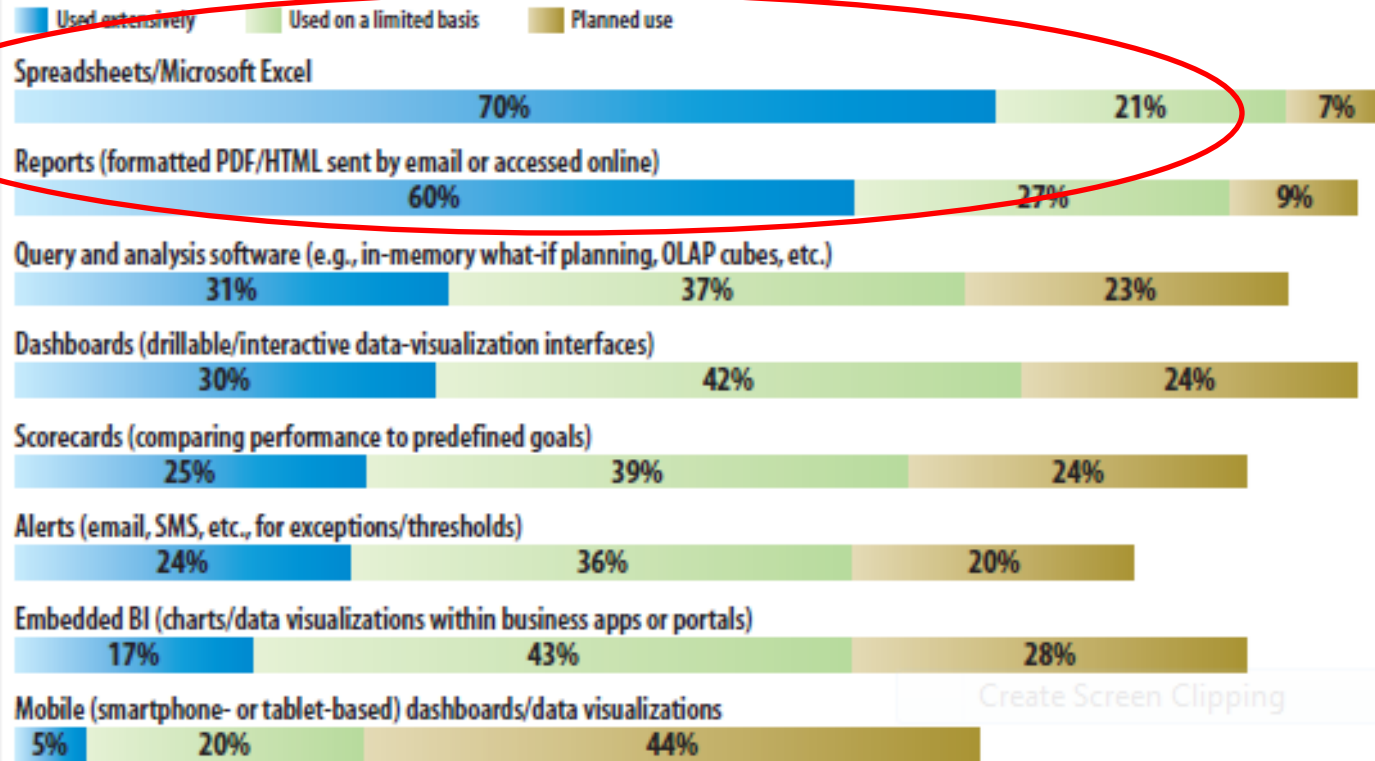
Extended Results

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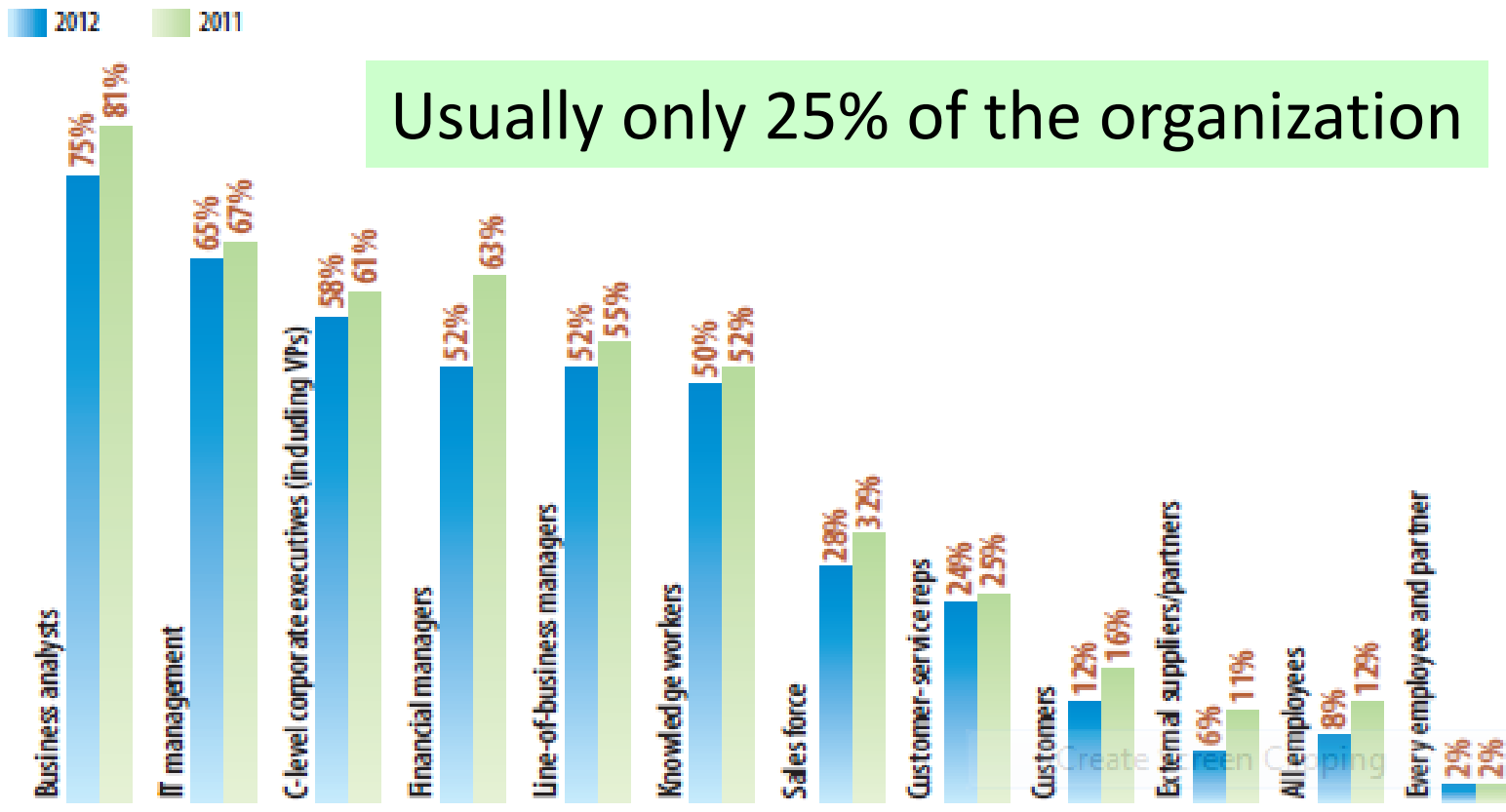
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# BI is still not for everyone

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Note: Multiple responses allowed

R3351111/2

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Data: InformationWeek Business Intelligence, Analytics and Information Management Survey of business technology professionals



# BI General Platforms (Part 1):

Package	Rep in Israel	Integrators
SAP BW + SAP Business Objects, Explorer	SAP Israel	Matrix BI, Advantech, Taldor, Malam-Team, One1 (+Xact), Ness-Gilon, Skywin, Consist, Point of View, IBM, Data Cubes, VisionBI, Active View, HP, Eternity, BICS, Xioma
Microsoft (SQL Server + PerformancePoint Server)	Microsoft Israel	Eternity, Opisoft, Ness-Gilon, ONE1 BI, Matrix BI, Consist, Advantech, Gstat (datamining), Bynet SW, Elad, Malam-Team, Libi, Top-soft, Enix, MOSS SIs
IBM - Cognos	IBM Israel	Libi, Opisoft, Seven-D, Ness-Gilon, Consist, Eternity, Advantech, IBM, Mirkam (Energy), Malam-Team, ONE1 BI, Normative
IBI - WebFOCUS	Malam-Team	Malam-Team, Ness-Gilon, ALD
Oracle OBI EE	Oracle Israel	Oracle Consulting, Taldor, Ness-Gilon, Data Cube, Vision BI, Enix, 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, Libi, BDO
Pyramid Analytics	Pilat ITCOM	Pilat ITCOM, Eternity, Normative, VisionBI, Datacube, Opisoft

# BI General Platforms (Part 2):

Package	Rep in Israel	Integrators
SPSS	IBM	Genius, IBM - GBS Gstat, Matrix BI
SAS	Mia Computers	Mia, Ness-Gilon, Pareto, HMS, Antropy, Liran Lavi, Goldmines
Panorama Novaview, Necto	Panorama	Matrix BI (+HighView), Ness-Gilon, Consist, Data Cube, ONE1 BI, Business Solutions, Citrine BI, VisionBI, Eternity, Opisoft
Microstrategy	Mittwoch	Mittwoch
EIS (Sigma)	Ness-Gilon	Ness-Gilon
Actuate iServer (Enterprise Reporting)	Ratio	Ratio
Syndera (Operational BI)	Ratio	Ratio
Spotfire (Tibco)	Yael Software	Yael Software, Eternity
Pentaho (Open source BI)		Eternity, Tikal, Malam-Team
Palo (Open source BI)		Ness-Gilon

# Data discovery / Interactive Visualization tools:

Package	Rep in Israel	Integrators
Qlikview	Hilan	Hilan, Ness-Gilon, Michshuv Maarachot, ONE1 BI, Malam-Team, Complete ,Tirosh ,Consist , Servit , Enix, Ludan, Libi
Spotfire (Tibco)	Yael Software	Yael Software, Eternity
Tableau	SIT, Gstat	SIT, Gstat, VisionBI, Consist
Microstrategy Visual Insight	I.E Mittwoch	I.E Mittwoch
Endeca - acquired by Oracle (Search-based data discovery)	Oracle	
Microsoft - PowerPivot	Microsoft	Microsoft BI partners
IBM – Cognos Insight	IBM	
SAS JMP	Mia computers	Mia, Gstat...
SAP Explorer (search-driven BI)	SAP Israel	SAP BO partners

# A new category: Big Data Analytics tools

Example: 1010data

The logo for 1010data, featuring the text "1010data" in white on a red rectangular background.

## Data Warehouse 3.0 The Smarter Way to Do Big Data

For more than a decade, 1010data has pushed the limit of data warehouse technology and gained more than 200 blue-chip customers in the process.

But, that was the easy part. 1010data has also done something with the data warehouse that has never been done before.

**We reimagined it. We call it Data Warehouse 3.0.**

It's [Raw](#). It's [Interactive](#). It's [Sharable](#)

From routine reporting to advanced analytics, the 1010data Big Data Warehouse brings power and simplicity to all types of Business Intelligence activities.

1010data reduces IT overhead, makes analysts more productive, and can help you make or save your business millions of dollars.

<http://www.1010data.com>



# BI Dashboards (Partial list):

Package	Rep in Israel	Integrators
SAP Xcelius	SAP Israel	Matrix BI, Advantech, One1 (+Xact)
Microsoft (PerformancePoint)	Microsoft Israel	Eternity, Consist, Ness-Gilon, ONE1 BI, Matrix BI, Opisoft, Advantech, Bynet SW, Elad, Malam-Team, Libi, Top-soft, MOSS partners...
Cognos (An IBM company) Metrics Studio	IBM Israel	Libi, Opisoft, Ness-Gilon, Consist, Eternity, Advantech, IBM, Malam-Team, ONE1 BI
WebFOCUS Dashboard	Malam-Team	Malam-Team, Ness-Gilon, ALD
Panorama	Panorama	Matrix (+Highview), Ness-Gilon, Consist, Data Cube, ONE1 BI, Business Solutions, Citrine BI, VisionBI, Eternity
Qlikview	Hilan	Hilan, Ness-Gilon, Michshuv Maarachot, ONE1 BI, Malam-Team, Complete ,Tirosh ,Consist , Servit , Enix, Ludan, Libi
Pyramid Analytics - dashboard	Pilat ITCOM	Pilat ITCOM
Tableau	SIT, Gstat	SIT, Gstat, VisionBI, Consist

All BI suits include dashboard modules

# BI – Selected Installations 2011-1Q12

## Partial List of selected wins +(implementers)- part 1

- ▶ **SAP – Business Objects:** Given Imaging includes explorer on iPads (Ness-Gilon), Hadassah (Ness-Gilon), Trade Networks, Better Place, Diplomat, Strauss, Sonol (Xcelius on iPads, Webi), Colmobil Crystal reports (Ness-Gilon), Police, IEC analytic applications, Fiat (Explorer on iPads), Clal Xcelius (Matrix), Paz Xcelius (Matrix), Elbit Xcelius (Matrix), Netafim – BW upgrade (One1 – Xact)
- ▶ **Cognos:** Metronit Yafe Nof (Malam-Team), Clal (Libi), Harel (Libi), Elyahu cLibi (Libi), Orbotech (Libi, on Oracle ERP. BSC, Metrics Manager), TAAS (on TM1, Libi), Kupat Cholim Meuchedet, Double Verify (Vision BI), Rakevet Israel (on BW, Libi)
  - ▶ Cognos 10 upgrades: Cellcom, Bank of Israel, Clal
- ▶ **Web Focus:** Pelephone, Ministry of Wellfare, Dead Sea Works (on BW), Jerusalem municipality (Dashboard)
- ▶ **Oracle:**
  - ▶ **OBI EE:** Elisra, Maccabi dent, Galam (OneBI)
  - ▶ **ERP BI Apps:** Tnuva, Plassan (Ness-Gilon), Visa CAL
  - ▶ **CRM BI Apps:** Clalit (Ness-Gilon), Bank Leumi, Bank of Jerusalem

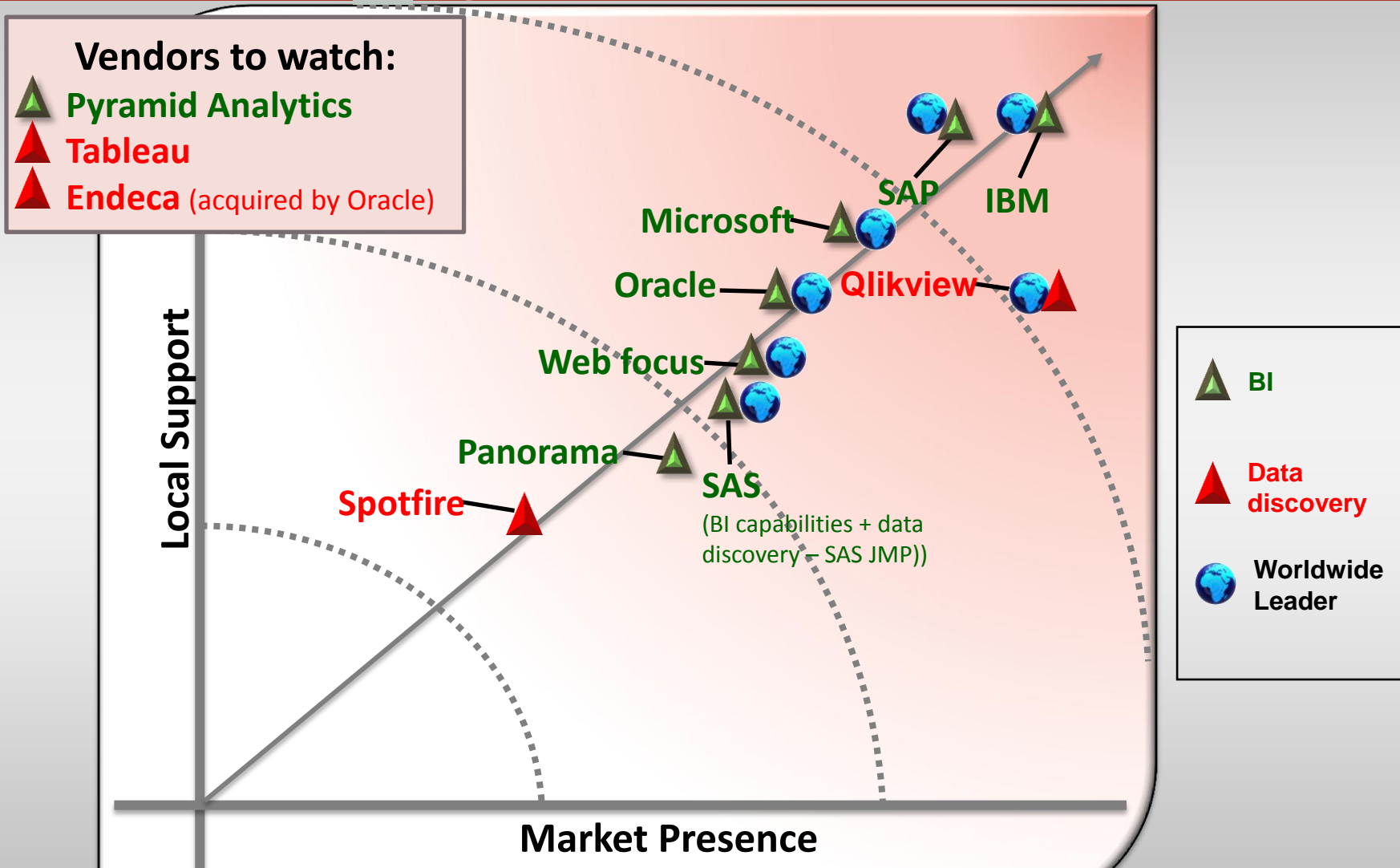
# BI – Selected Installations 2011-1Q12

## Partial List of selected wins +(implementers)- part 2

- ▶ **Spotfire:** Clalit, Teva, Isracard, Bank Poalim
- ▶ **Qlikview:** eBay, Bezeq International, Playtica, Partner Eng. (Ness-Gilon), Pelephone, Makhteshim, HOT, Clal (Ness-Gilon), Osem, (on SAP, Libi), H&M (Libi), Mekorot (Enix)
  - ▶ Expansions in Police, Phoenix, Better Place, GHF (Ness-Gilon), AFI (Ness-Gilon)
- ▶ **SAS:** Paz, IEC (Dashboard), Social Security (Dashboard). Bank Mizrachi (Dashboard), Bank Leumi, Bank Poalim, El-Al – Financial (Gilon), IDF, Visa CAL, Eliyahu (BI Portal), Israel Securities Authority, M. of Internal Affairs, Opal
- ▶ **SPSS:** Police, Partner, Tax Authority
- ▶ **Tableau:** Bezeq, TAAS, Tidhar, Medingo, Yad Sarah, Poliram
- ▶ **Pyramid Analytics:** Toto, BDO, Migdaley Hayam Hatichon

# Front end BI and data discovery tools

## Israeli Market Positioning 1Q12



This positioning includes only **Front End BI tools** (reporting, query, dashboards) not analytic/data mining tools and does NOT take into consideration the **depth of analysis** with these tools



*This analysis should be used with its supporting documents*



# The 2 P's

Predictive + Proactive

# Advanced analytics tools (Partial list):

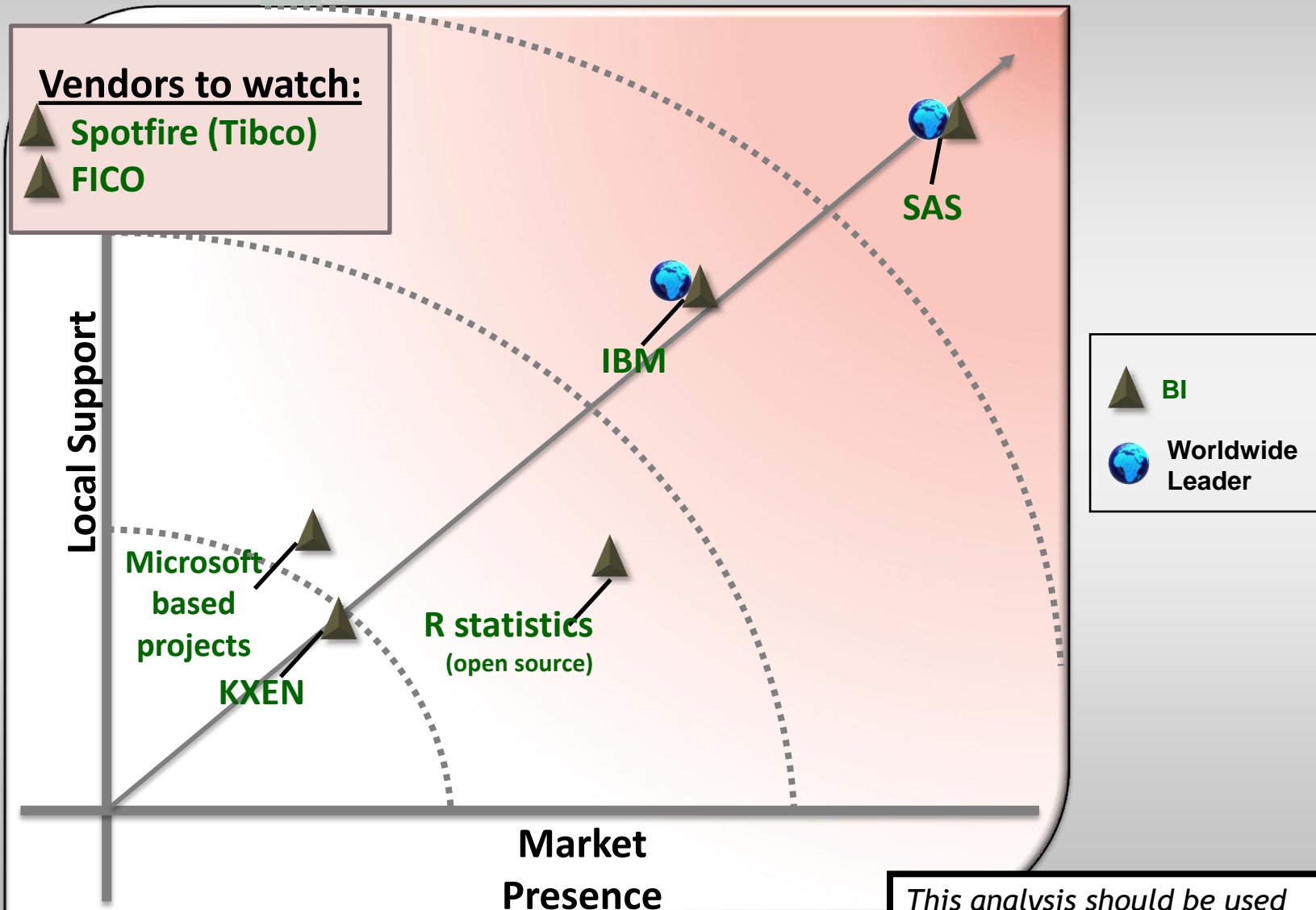
Package	Marketing Company
 SAS	Mia, Ness-Gilon, Pareto, HMS, Antropy, Liran Lavi, Goldmines
 IBM – SPSS, Unica	IBM - GBS, Genius, Matrix BI, Ness-Gilon
KXEN	KDE Group
R statistics – open source community	
Tibco Spotfire Miner	Yael
Microsoft – data mining algorithms within SQL	Microsoft Israel, Gstat
Gstat analytic solutions	Gstat
FICO	Ness
IBM i2 for defense sector	Matrix

 **Worldwide Leader**

CRM, Campaign Management, BI and other application packages include pre-built analytics models or some data mining capabilities

# Analytic & data mining tools

## Israeli Market Positioning 1Q12



# Moving from Data mining platforms to analytic solutions



# BI & Data specialists - Partial List

(Alphabetical order, not a ranking!) – Part 1



- **Accenture**: Strategic business level consulting
- **Aman** – data management
- **Activeview** – data integration
- **Advantech**
- **BICS** – BI for SAP and BW
- **B-Pro** – stood out in strategic BI consulting
- **Business & Decisions** – stood out in financial BI
- **Citrine BI**
- **Consist**
- **Data Cube**
- **Enix**
- **Eternity** – stood out in Microsoft, and in combining BI with Search & Portals
- **Ergo** – Balanced Scorecard consulting
- **Gstat** – analytics, data mining, campaign management
- **HMS** – stood out in strategic financial BI, risk management

# BI & Data specialists - Partial List

## (Alphabetical order, not a ranking!) – Part 2

- **IBM** – BI and strategic optimization analysis (BAO)
- **Inquera** – stood out in product catalog data cleansing
- **ONE1 BI + One1 Liam** – stood out in big data
- **Opisoft** – stood out in BSC/metrics projects
- **Libi**
- **Malam-Team**
- **Maarachot Hachlata (Yoram Levin)** - consulting
- **Matrix BI (+HighView)** – stood out in visualization - BSC/dashboards
- **Ness-Gilon** – stood out in big data, BI-process-as-a-service, EPM, customer analytics
- **Normative**
- **Nugami** - consulting
- **Pareto** – Data Mining
- **Point of View**
- **Ratio** – BSC and KPIs consulting
- **TCS Israel – Tata**
- **Xioma**
- **Vision BI** – stood out in Big Data projects

# MDM/ Data Hub technologies in Israel

Package	Rep in Israel	Integrators
 Oracle Siebel UCM	Oracle Israel	Matrix (+BeyondIT), Yael, Malam-Team, Taldor
SAP MDM	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)	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

# MDM new wins 2011-2012 (Partial list):

- ▶ **Oracle UCM:** Menora (Taldor), Clalit (Yael), Visa CAL (Matrix),
- ▶ **SAP MDM:** M. of Health (PIM), Bank Israel

Big data's impact on data quality is two-sided. On one hand, it intensifies the need to clean the data we're relying on. On the other, volume makes "individual" mistakes seem smaller in the larger context.

The "Variety" of big data poses new challenges in data quality: the data is not created within the organization and isn't "owned" by it. Also, the data is less structured and "messy"

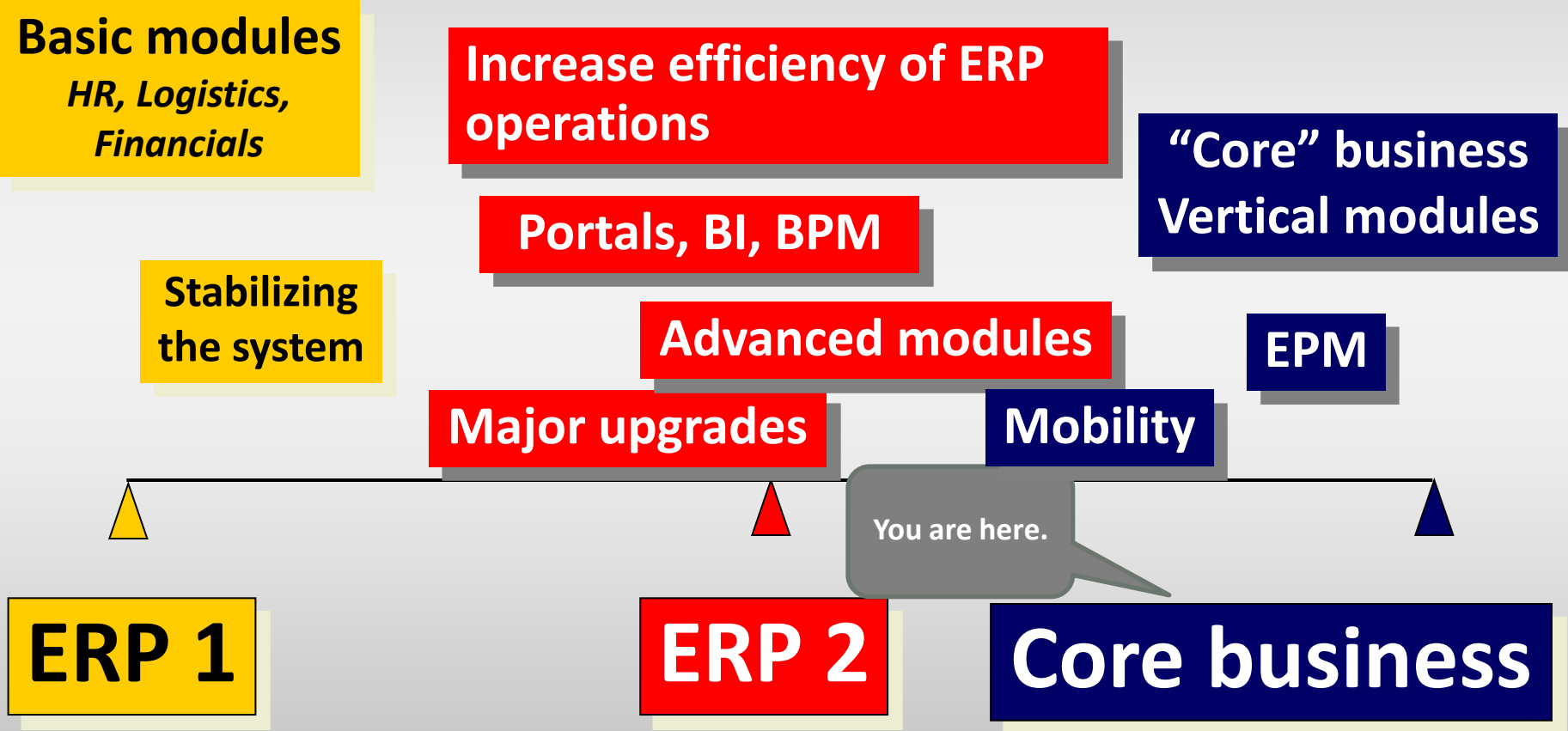


ERP



Core  
business

# ERP Life Cycle



# ERP – local vs. international packages

- ▲ A very good year for Israeli ERP packages
  - ▲ Many replacements of AS400 legacy apps
  - ▲ SMBs worried about high international ERP TCO
  
- ▲ New player: Microsoft Navision entered the SMB ERP market in Israel

# ERP maintenance costs exploding

We received many questions during 2011 on high ERP maintenance costs which leads to:

- ERP “Rationalization”
- Back to basics -> Vanilla is good!
- Move to “Israeli ERP based” package?
- Efforts to gain operational efficiency: SAP solution manager, quarterly version upgrades of internal changes
- But most aren’t considering outsourcing

# HR & Talent management



(c) Recruiter's Blog

# Interest in HCM is finally rising in Israel

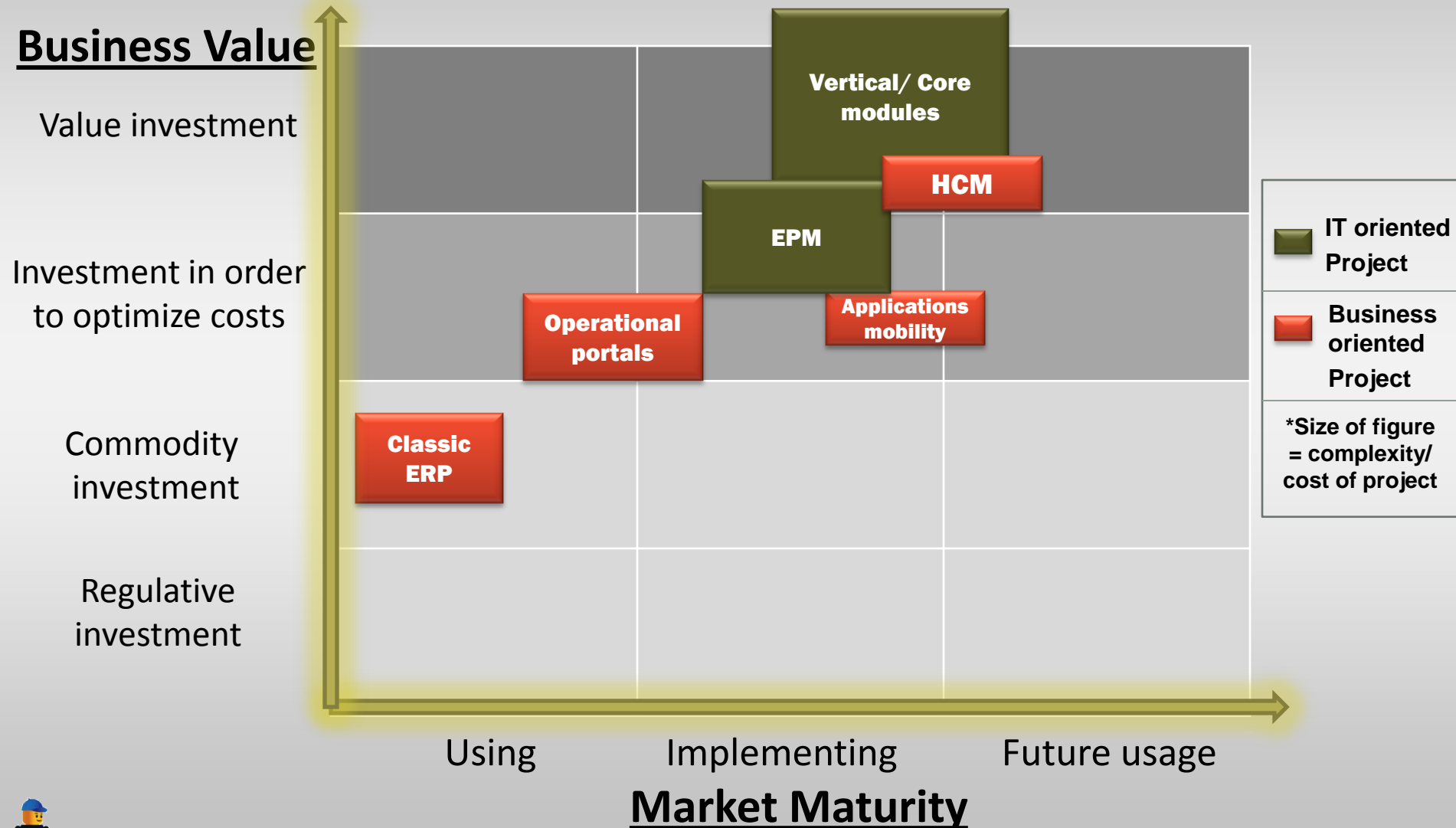
During 2011 STKI received many questions on projects related to human capital:

- Recruitment management & e-recruitment
- Skills management
- Incentives and performance management
- Talent management

M&As: SAP – Successfactors; Oracle – Taleo



# ERP Maturity Model



# ERP Packages & Integrators: Part 1

Package	Israel Rep	Integrators	Delivery model
Oracle e-Business Suite	Oracle Israel	ONE1UP, Advantech, Yael, Unitask, Motorola, Oracle consulting, Taldor, HP, Ernst & Young, TATA (TCS Israel), Ness, Pilat ITCOM, Systematics (PLM)	On-premise, <b>Some SaaS solutions</b> (i.e, HR, Sourcing)
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 All-in-One	SAP Israel	Taldor, Advantech, Ness, Malam-Team, CBIT, SAPLM	On-premise
SAP Business One	SAP Israel	Xioma, RELS, Complete, Menahel4U, Todan, BDO, Ziv systems, Corvet, Cloud: Triple C, Webox	On-premise, <b>SaaS by partner in Israel</b>
E-Tafnit	Matrix	Matrix, Alpha Consultants	On-premise, <b>SaaS</b>
QAD	SIT	SIT, ManofIT, Tirosh	On-premise, <b>SaaS</b>
Priority	Ashbal	Ashbal, Meidatech, FBC Afek, Tulip, RAAN, HP, IlitERP	On-premise, <b>SaaS (w/Meida-Tech)</b>
Lawson (M3, S3)	Intentia Israel	Intentia Israel	On-premise
ONE ERP	ONE1	ONE1, Anagal, Y. Ovitz	On-premise, <b>SaaS</b>
KAV systems	Kav	Kav, Ardor	On-premise

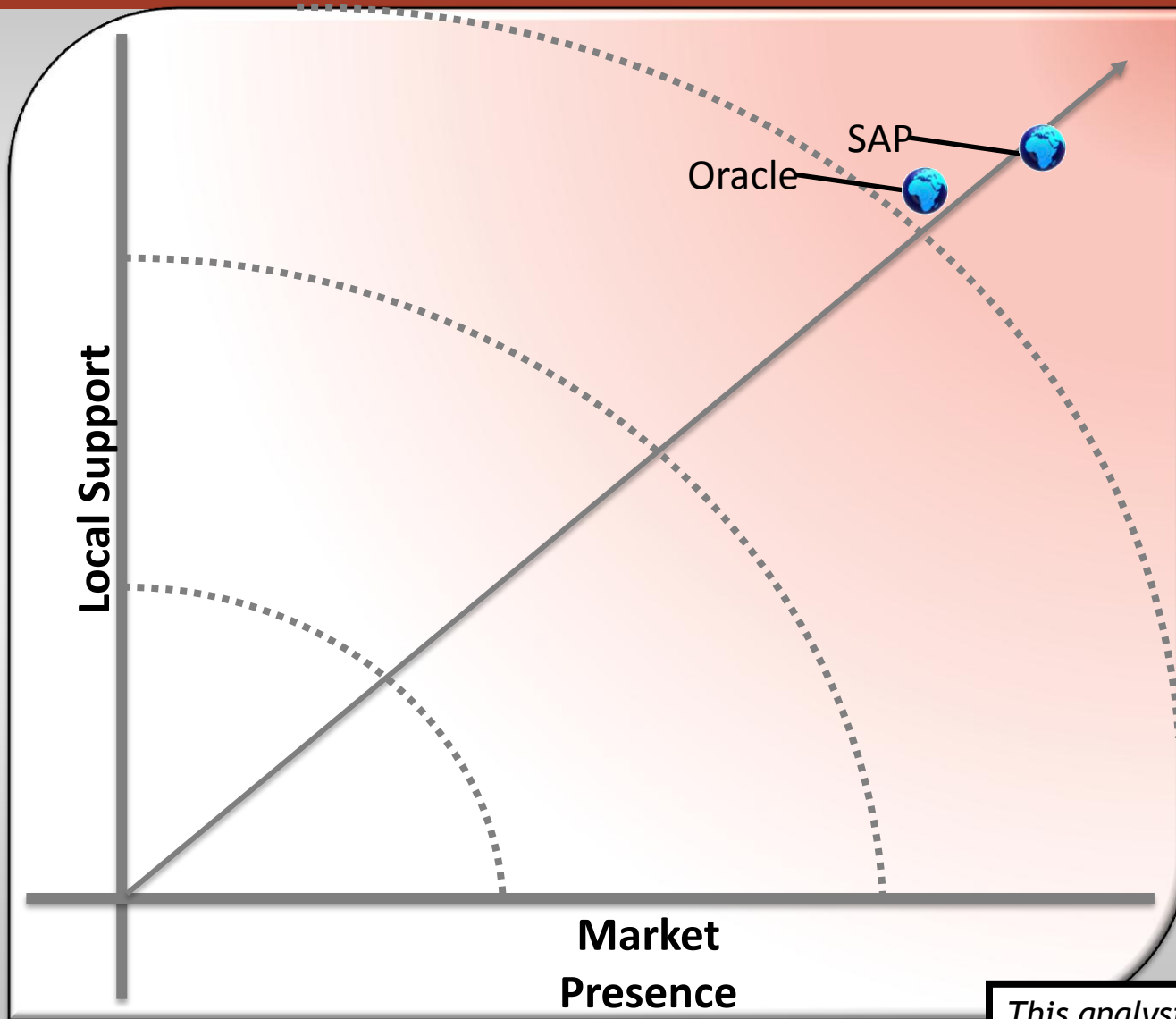


# ERP Packages & Integrators: Part 2

Package	Israel Rep	Integrators	Delivery Model
Microsoft Dynamics AX	Microsoft Israel. Localization & Distribution by Prodware	Prodware, Oregano, Maxsoft, Pisga, Axperts, Almog	On-premise
Microsoft Dynamics NAV	Microsoft Israel. Localization & Distribution by Prodware	Prodware	On-premise, <b>SaaS</b>
Aviv, MARS	Aviv	Aviv	On-premise
FinPro, Logistic Pro	Almog	Almog	On-premise
Gan Tochnot Heshev	Aman	Aman	On-demand, <b>SaaS-Israel</b>
Comax (on demand)	Comax		On-demand, <b>SaaS-Israel</b>
Profit	Michshuv Group		
Netsuite	NetCloud, Pilat IT Com		<b>SaaS</b>
Bgate	Bgate		On-premise, <b>SaaS</b>
IFS	Teldan		On-premise
ERP for municipalities	Automazia	Automazia	On-premise, <b>SaaS-Israel</b>
BPCS, Baan	Matrix	Matrix, Afek, IBM, Tulip (Baan)	On-premise

# 1. Enterprise ERP - Israeli Market Positioning 1Q12

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

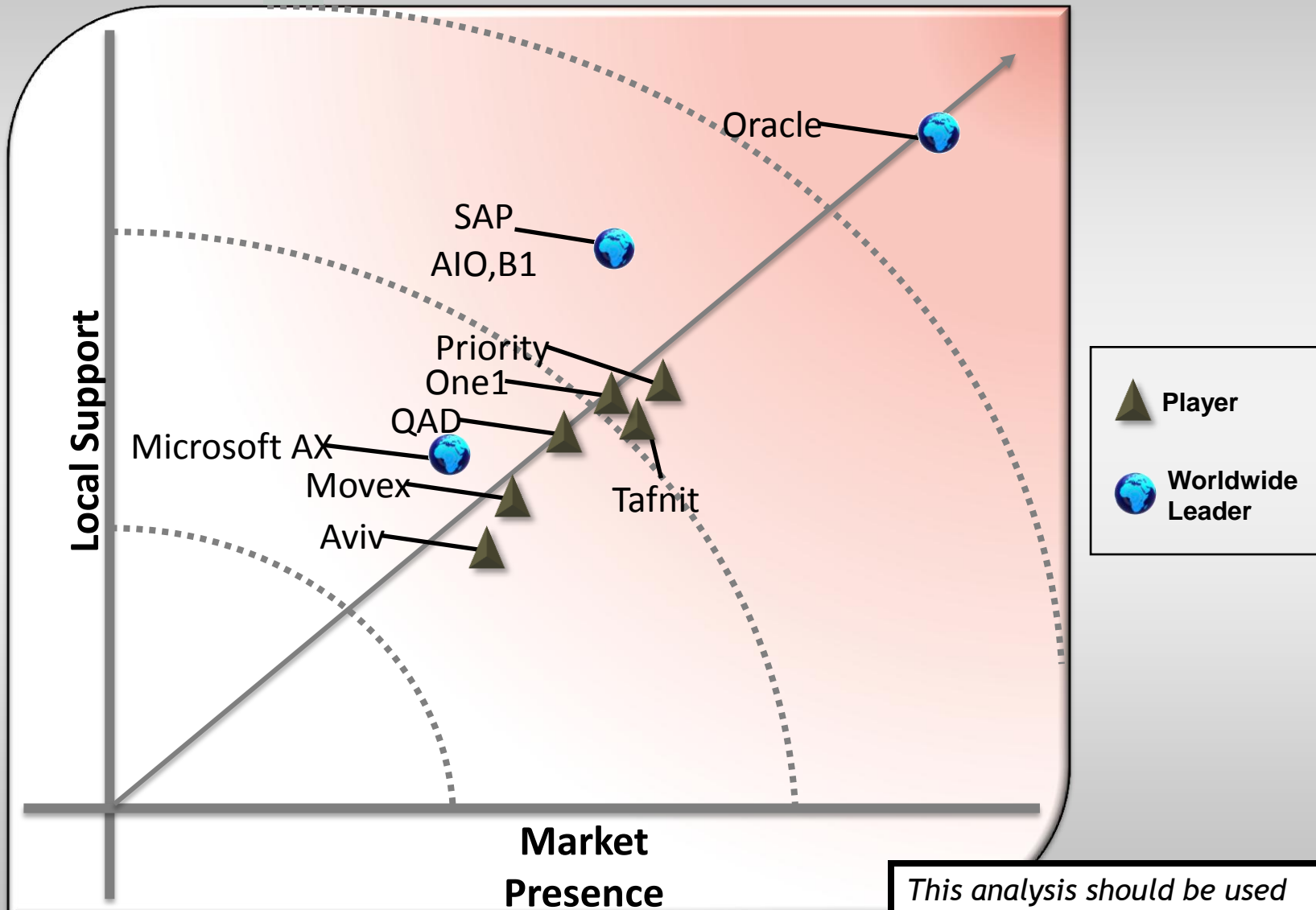


▲ Player  
🌐 Worldwide Leader

*This analysis should be used with its supporting documents*

# 2. Mid-Large ERP - Israeli Market Positioning 1Q12

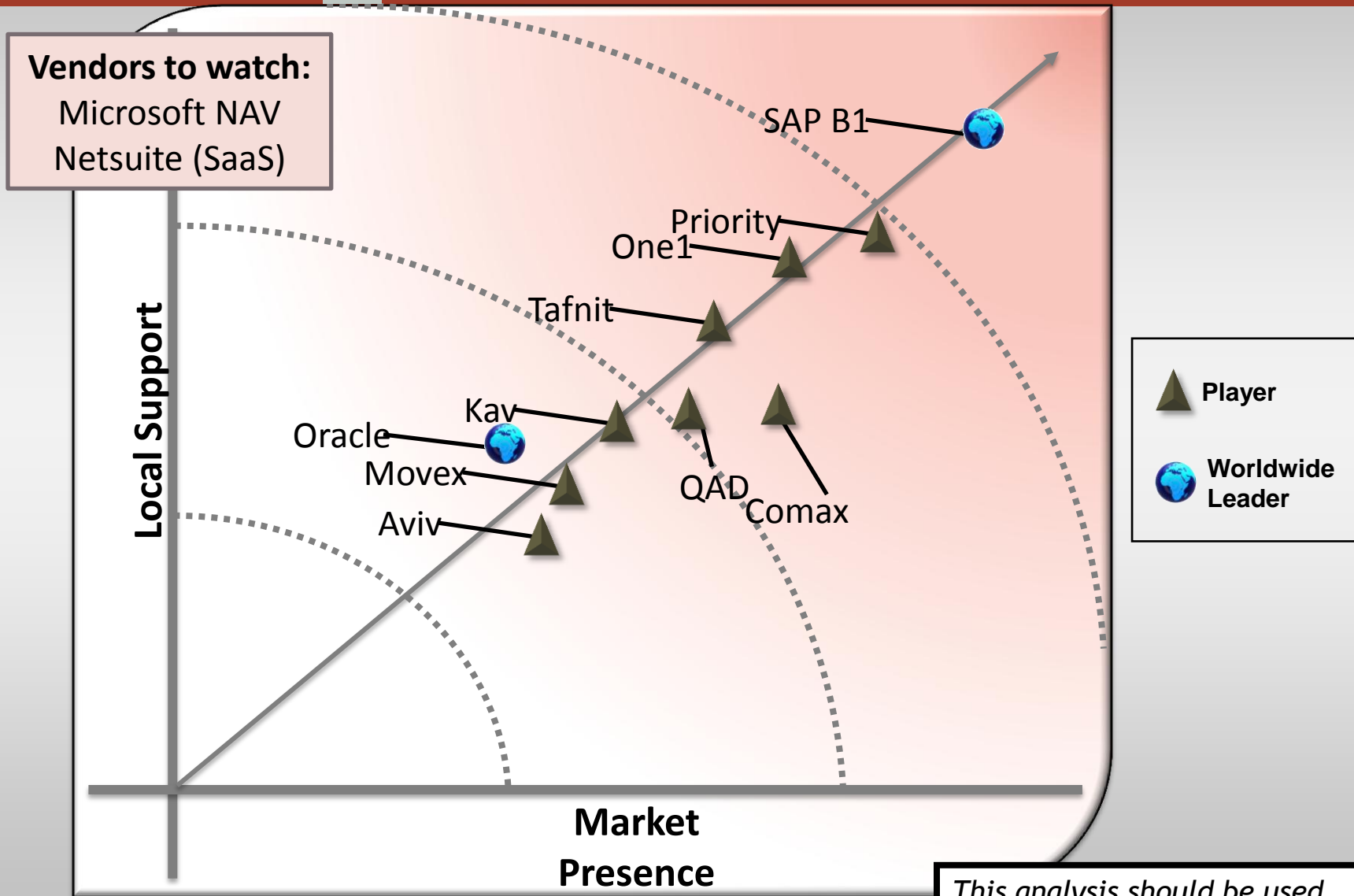
Medium-Large ERP projects (~100-300 users, mid-large org.)



*This analysis should be used with its supporting documents*

# 3. Small-mid ERP - Israeli Market Positioning 1Q12

## Small-medium ERP projects (~10-100 users)



*This analysis should be used with its supporting documents*

# ERP Selected Wins during 2011/1Q2012

## Partial List of project wins +(implementers)- part 1

- ▲ **SAP:** Amiad (Taldor), Menora (Ness), El Al (Ness)
  - ▲ Expansions/New modules: Sonol – Retail (Ness), Phoenix – ICM (Ness), Rakevet Israel – BPC module (Malam-Team), Police – ISH (HP) + HR, Phoenix – HR (HP), Bank Poalim (AFI), IEC (Portfolio mng), IDF projects, Delek Europe, Tnuva – Mobile (Ness), Mahog (Ness), Ayalon - FI (Ness), Maccabi - GRC (Ness), Given Imaging - GRC (Ness), Yafora - GRC (Ness), Yes – Billing (Ness)
  - ▲ Rollouts: Tower (Ness), CMT roll-in (Ness), Haifa Chemicals (Advantech), Liveperson Roll-in (Advantech)
- ▲ **Sap all-in-one:** Lodan (Malam-Team)
- ▲ **Sap Business-One:** Africa Israel (Menahel4U), Aminach (Complete), Shiran, Boney Hatichon, TTI telecom, Lilit Cosmetics, Tobol, Gindi holdings, Yaacobi, Exphone – includes billing (Menahel4U)
  - ▲ Cloud (TripleC): Bit and Byte
- ▲ **Netsuite:** Interfax, Groupon, Imperva

# ERP Selected Wins during 2011/1Q2012

## Partial List of project wins +(implementers)- part 2

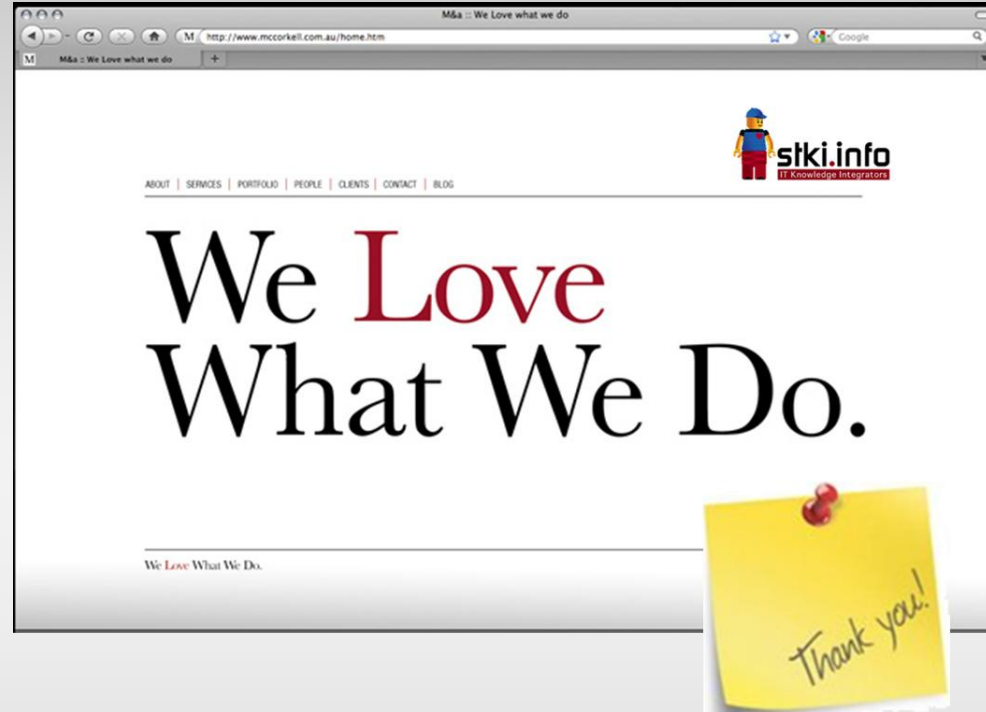
- ▶ **Oracle:** Neshar (One1), Phibro, Soda Stream, Pocared Diagnostics, Bar Ilan University (expansion from HR to ERP)
  - ▶ **R12 upgrades (Advantech, One1, Unitask, Yael):** Foris, Cubic, Rapa, Applied Materials (One1), Ormat (One1), Open University, Zeraim Gadera, Galam
  - ▶ **Expansions:** Mellanox – HR module, RH tech – Product data quality, Visa CAL – advanced collections (Advantech) + advanced procurement, Frutarom (HR, Yael)
  - ▶ **Rollouts (One1):** Kazaa, Verint, Gadot, Radvision, Soda Club, Teva, Verifone
- ▶ **One1ERP (MaaleNX):** Oranim bakery, Haemek factories, Mishmar Hanegev, Negev Ecology, Via Arkadia, Alon Cellular, Kornish, Dan – MRO, Hatnua Emek Hefer, Hof Hefer, Masuot Yitzhak – control, Eurocom – repair factory, Kibbutz Shoval, Optiplast factory, Ichilov – catering module
- ▶ **Tafnit:** Global Factoring, Diplomat Intercoma, Regba, Alcol electronics, UMI (CRM), Veizman Institute, Ben Gurion, Marom, Electra Bar, Caspit, Poalim (loans), Platinum (factoring), Securities mng in credit card companies, Carasso – service, Opel, Projects in Union motors and Yapanoto
- ▶ **Microsoft Dynamics AX:** Africa Israel Hotels; Delta Galil (HR module); Nirosoft; Eromix; M.S. Aluminium; Paltop; Ceragon; Reches; Amobee; Off-Tov (Maxsoft + Prodware); BAE Rokar

# ERP Consultants - Partial List

(Alphabetical order, not a ranking!)

- ▲ Accenture
- ▲ Bit-Plus
- ▲ Deloitte Touche
- ▲ Ernst & Young
- ▲ Gabi Ron
- ▲ HMS
- ▲ Meteor
- ▲ OIC
- ▲ Seker
- ▲ That's IT
- ▲ TCS Israel - Tata
- ▲ Tulip
- ▲ Value Plus (SAP)
- ▲ Several Independent advisors

Thanks for your patience and hope you enjoyed



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# Thank you!

## Einat Shimoni



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