



Smart IT: Do More with Less



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Concerns & Opportunities In A Challenging Economy

Industry Consolidation

Globalization

Stock Price

Job Uncertainty

Employee Morale

New Partnerships

Revenue Growth

Productivity

Retaining Talent

Competitive Differentiation

Customer Loyalty

Cost Containment

Supplier Viability

Innovation

Time to Market

Quality



IT Spending Landscape for 2009

- Developed market IT spend declines of 8% for 2009 & emerging market growth of 3% = 4% decline globally.
- 72% of CIOs plan to fund initiatives focused on reducing operating expenses including personnel costs.

January 11, 2009

Goldman Sachs Global Investment Research

US Technology Strategy: Independent Insight

IT Spending Survey: Mapping 2009

THIS IS THE 44TH ISSUE IN OUR IT SPENDING SURVEY SERIES.
OUR SURVEY PANEL IS MADE UP OF 100 MANAGERS WITH
STRATEGIC DECISION-MAKING AUTHORITY AT MULTINATIONAL
FORTUNE 1000 COMPANIES

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What can you do?

- Improve Business Process
- Reduce enterprise cost
- Improve Workforce Effectiveness
- Attracting and Retain customers
- Increase use of information/analytics
- Create new products or services
- Target customers and markets more effectively
- Manage change initiatives
- Expand current customer relationships
- Expand into new markets or geographies
- Consolidate Business Operations
- Support regulation, reporting and compliance
- Creating new sources of competitive advantage

Source: Meeting The Challenge, The 2009 CIO Agenda, Gartner

Recommendations

- Be decisive in setting priorities on actions that raise business process and workforce effectiveness
- Do the first things faster, as changing economic conditions render large project irrelevant
- Be resourceful in restructuring IT to raise its productivity and agility. Need for IT is not reduced because you have lesser resources
- Modernize the technical infrastructure. New technology have better performance and greater capacity

Employees



“Why can't I work from home?”

“Let me use a Mac! Why won't you support my iPhone?”

**The New
Workspace**

Partners



“Give me equal access”

“Empower me, Include me, Help me help you ”

**Cross-Company
Collaboration**

Customers



“Give me faster, better service”

“Let me contribute to the solution, let me voice my opinion ”

**Customer
Intimacy**

Business Leaders



“Transform IT, transform our customers, transform the world”

**Business
Transformation**

Business Imperatives Today

Save to Invest

Unlock Employee Potential

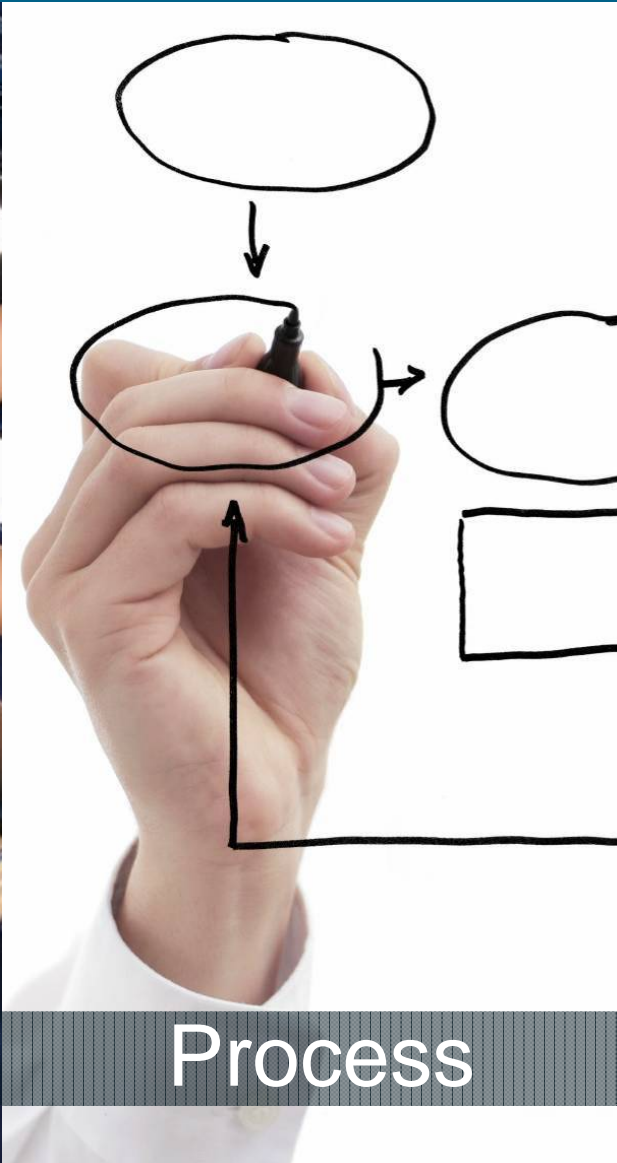
Transition To A
Borderless Enterprise

Drive True Customer Intimacy

Distance Yourself From Competitors



Culture



Process



Technology

Collaboration Is The Platform For Business

Save to Invest

Conduct In-Person Meetings Without Traveling

Consolidate & Centralize IT Infrastructure & Resources

Cut Real Estate & Energy Costs by Enabling a Remote and Connected Workforce

Control mobility costs by routing mobile long distance calls over the Enterprise IP network

Culture

Process

Technology

Unlock Employee Potential

Enable Employees to Work Securely from Anywhere, Anytime

Increase Customer Interactions & Maximize Expert Availability

Develop Custom Applications to Automate and Optimize Business Processes

Promote Employee Participation To Drive Innovation and Self-Service

Culture

Process

Technology

Drive True Customer Intimacy

Increase the Quality &
Quantity of Customer
Meetings

Extend Your Reach to Support
Customers Anywhere, Anytime

Connect Customers With the
Right Expertise the First Time

Include Customers in Your
Innovation Process

Culture

Process

Technology

Distance Yourself from your Competition

Improve Time To Market By Including Partners & Suppliers In Your Innovation Processes

Broaden Sales & Growth Potential Through Collaborative Prospecting With Resellers

Enter New, Global Markets Without Adding New Resources

Unlock Adjacent Business Models That Yield New Revenue Streams

Culture

Process

Technology

Transition to a Borderless Enterprise

A Globally Connected &
Aligned Ecosystem...

That Innovates & Executes
Faster & More Effectively...

To Differentiate Your Business
Through Collaboration...

On Any Device, Anytime,
Anywhere, and With Anyone...

Because the Network
Is The Platform...





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