SAP Things To Think About In 2013

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Getting Value from Enterprise Systems

1. **Realize much more value** from their systems and use them in distinctly different ways.

2. Likely to **seek and measure tangible benefits**, such as reduced cost and increased revenue.

3. Emphasis on **integrating, optimizing and using analytics** to drive improved business performance.

4. **Extend systems** throughout their organization and implement across a range of functions.

5. **Integrate** the organization and external systems of customers and suppliers.

6. **Aggressively use information and analytics** to improve decision making.

7. Use strategically for **competitive differentiation**.

8. **Tailor systems** to sustain competitive advantage and **standardize** other areas.

9. More likely to **implement industry modules**.

10. Twice as likely to **take advantage of SOA**.
## Executive Priorities, 2013

<table>
<thead>
<tr>
<th>Rank</th>
<th>Top 10 CEO’s Business Priorities</th>
<th>Top 10 CIO’s Technology Priorities</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Increasing enterprise growth</td>
<td>Analytics and business intelligence</td>
</tr>
<tr>
<td>2</td>
<td>Reducing enterprise costs</td>
<td>Mobile technologies</td>
</tr>
<tr>
<td>3</td>
<td>Expanding into new markets and geographies</td>
<td>Cloud computing (SaaS, IaaS, Paas)</td>
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<td>4</td>
<td>Increase profitability</td>
<td>Collaboration technologies (workflow)</td>
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<tr>
<td>5</td>
<td>Implementing finance and controls</td>
<td>Legacy modernisation</td>
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<tr>
<td>6</td>
<td>Talent and workforce management/development</td>
<td>IT management</td>
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<tr>
<td>7</td>
<td>Consolidating, standardizing and streamlining operations</td>
<td>Customer Relationship Management (CRM)</td>
</tr>
<tr>
<td>8</td>
<td>Execute acquisitions, mergers and partnerships</td>
<td>Virtualisation</td>
</tr>
<tr>
<td>9</td>
<td>Improve governance, risk, compliance and security</td>
<td>Security</td>
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<td></td>
<td></td>
<td>ERP Applications</td>
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</tbody>
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## Analyst’s predictions for 2013

<table>
<thead>
<tr>
<th>Source</th>
<th>Trend #1</th>
<th>Trend #2</th>
<th>Trend #3</th>
<th>Trend #4</th>
<th>Trend #5</th>
</tr>
</thead>
<tbody>
<tr>
<td>IDC¹</td>
<td>Mobile proliferation</td>
<td>New generation of industry solutions</td>
<td>M&amp;A in cloud SaaS</td>
<td>Social network sprawl</td>
<td>Rapid growth in discovery and predictive analytics</td>
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<tr>
<td>Gartner²</td>
<td>Internet of things</td>
<td>“Big Data” meets social</td>
<td>Actionable analytics</td>
<td>Mainstream in-memory computing</td>
<td>Mobile apps and HTML5</td>
</tr>
<tr>
<td>Saugatuck³</td>
<td>Mobility will dominate</td>
<td>Velocity of business</td>
<td>Integrated, vertically optimized cloud solutions</td>
<td>Analytics in cloud offerings</td>
<td>Evolution of IT organization</td>
</tr>
<tr>
<td>Forrester⁴</td>
<td>iPads in enterprise</td>
<td>Cloud and smart computing</td>
<td>Emerging markets</td>
<td>Demand for consulting services</td>
<td>-</td>
</tr>
<tr>
<td>Deloitte⁵</td>
<td>Mobile only (and beyond)</td>
<td>Social reengineering and beyond</td>
<td>Design as discipline</td>
<td>Reinventing ERP engine</td>
<td>Finding the face of your data</td>
</tr>
</tbody>
</table>

SAP’s STRATEGY

FIVE MARKETS

APPLICATIONS
ANALYTICS
DATABASE & TECHNOLOGY
MOBILE
CLOUD

HANA

SERVICES
Applications

Recommendations

1. Keep up to date with Enhancement Pack functionality
2. Investigate user interface options
3. Understand the different maintenance options

Sources:
Data discovery market will grow 28% to reach $1 billion in 2013\(^1\)

40% of BI purchasing will be led by LoBs by 2014\(^1\)

54% of users will be actively using, planning, or piloting mobile BI in 2013 (20% in 2012)\(^1\)

Analytics and smart process apps will grow by 17% in 2013\(^2\)

BI/analytics cloud adoption in SMB will grow 20% YoY\(^3\)

**Recommendations**

1. Understand your Business Intelligence Maturity
2. Develop a Business Intelligence strategy
3. Understand the potential and implications of HANA
4. Be careful of the tool’s bells and whistles
5. Investigate the implications of BIG DATA

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Sources:  
\(^3\)Gartner – “The SMB market in 2013 Drivers, Trends & Predictions” – Nov 2012;  
\(^4\)IDC – “Predictions 2013: Competing on the 3rd platform” – Doc #: 238944– Nov 2012;  
\(^5\)Ovum – “2013 Trends to Watch: BI and Analytics” – Nov 2012
Database & Technology

Application integration and DBMS will contribute more than 50% of “Big Data” IT spend in 2013¹

“Big Data” deployments in U.S. government are expected to grow 30% in 2013²

The “digital universe” will reach 4 zettabytes (~4B TB) by 2013 (50% YoY growth)³

Hadoop MapReduce ecosystem software revenue will grow by ~81% in 2013⁴

Recommendations
1. Evaluate data governance, data quality processes
2. Develop an in-memory strategy and roadmap
3. Plan the semantic layers
4. Data scientists?

Proliferation of smart technology (M2M) will drive a 25% increase in software spending by 2014\(^1\)

SMB’s mobile connectivity to enterprise business will grow 25% in 2013\(^2\)

33% of all new apps will target a mobile platform\(^3\)

Tablet market will grow by at least 42% in 2013\(^4\)

Smart mobile devices will generate 57% of overall IT market growth in 2013\(^4\)

**Recommendations**

1. Develop enterprise mobile strategy – BYOD?
2. Understand the potential and implications of SAP Mobile Infrastructure/Gateway/Afaria
3. Investigate Open Source options and SAP
4. Investigate mobility for operational efficiency and as a differentiator

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Cloud

More than $25 billion will be spent in SaaS acquisitions by mid 2014

Integration services (iPaaS) market will grow ~34% in 2013

By the end of 2013, 90% of consumer connected devices will have access to the personal cloud

Cloud security services will grow ~30% from 2012 to 2013

Two-thirds of mid-size firms will use cloud services in 2013, compared with just half in 2012

Recommendations

1. Identify Use Cases and roadmap
2. Understand the impact of SuccessFactors on HCM
3. Investigate the potential of Ariba
4. Investigate SAP NetWeaver Cloud offerings

Social

Recommendations

1. Develop a social strategy
2. Understand the potential of Analytics and social
3. Jam?
4. Social solutions integration

35% of government organizations will evaluate or implement social analytics tools in 2013 for collaboration and sentiment analysis¹

Team collaboration applications market will grow to ~$1.5 billion in 2013³

A vast majority of SMB retailers plan to spend up to 24% of their IT budget on social media in 2013⁴

15% of BI deployments will combine BI with collaboration and social software into decision-making environments in 2013²

Knowledge Community
Develop Knowledge Workers

Characteristics

• All over the organisation
• Broad skills on a solid base
• Not bound to one place
• Connects with colleagues, peers and client community everywhere
• Understands “the way we do things around here”
• Uses many tools
• No particular age
• Knowledgeable, interested, engaged, contributing
• Shares and distributes information freely
• CURIOUS
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