



Looking to Make **Digital Transformation** a Reality?

Turn to Trusted Partners for Maximum Effect

FROST & SULLIVAN VISUAL WHITEPAPER

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INTRODUCTION

The Time Is Now for Digital Transformation

The term digital transformation gets so much play these days, it's almost become a cliché. But Frost & Sullivan research shows that for most organizations, the gap between dreams and reality remains large.

In a recent survey of almost 2,000 IT decision-makers from around the world, nearly two-thirds list digital transformation as a top priority for the months and years to come—and yet most of these same respondents are unhappy with the level of success they've seen to date. Key challenges include uncertainty around the future of work, shrinking budgets for capital investments, and a lack of in-house talent and skill sets. But companies must overcome these roadblocks if they want to remain competitive in a changing business landscape—and reap the benefits of a truly connected and collaborative workplace.

Digital transformation is a driver for IT investments. Key priorities include adapting to new work models and customer expectations, increasing capacity to respond to higher demand, managing growth with fewer resources, enhancing eCommerce capabilities, and supporting security and compliance requirements. Other benefits include creating a foundation for innovation and cementing a measurable competitive advantage.

Source: Frost & Sullivan.





It's Time to Rethink How You Run Enterprise Applications

As organizations move toward a digital future, they must confront a vexing problem: Enterprise applications, which serve as the backbone of businesses, have created a large network of complex systems with enormous amounts of structured and unstructured data that require processing to draw meaningful insights and enable informed decisions.

Organizations can mitigate this scenario by leveraging advanced analytics, artificial intelligence (AI), and machine learning (ML) to build next-generation capabilities today.

This is especially important in customer interactions. For example, a customer might contact the business via chat, email, or social media—and that text or voice recording is unstructured data that needs to be collected and analyzed as part of the interaction. At the same time, the customer's history with the company is likely stored in a structured system, with info like name, address, and account number. Only by merging and leveraging the two data sets can companies deliver a complete, 360-degree view of the customer to agents (or automated systems), and only by acting on the two data sets can they deliver a truly personalized experience.

Top Challenges Organizations Face over the Next 12 Months



Managing/
optimizing IT/
cloud resources



Keeping up with
the pace of new
technology



Adjusting our technology
strategy in light of
market conditions



Deploying an app
across multiple IT
environments



Ensuring
compliance/security
of data & apps

Enterprises are leveraging the cloud to boost productivity, enable collaboration among remote and in-office employees, and connect people, devices, and data via intelligent platforms.



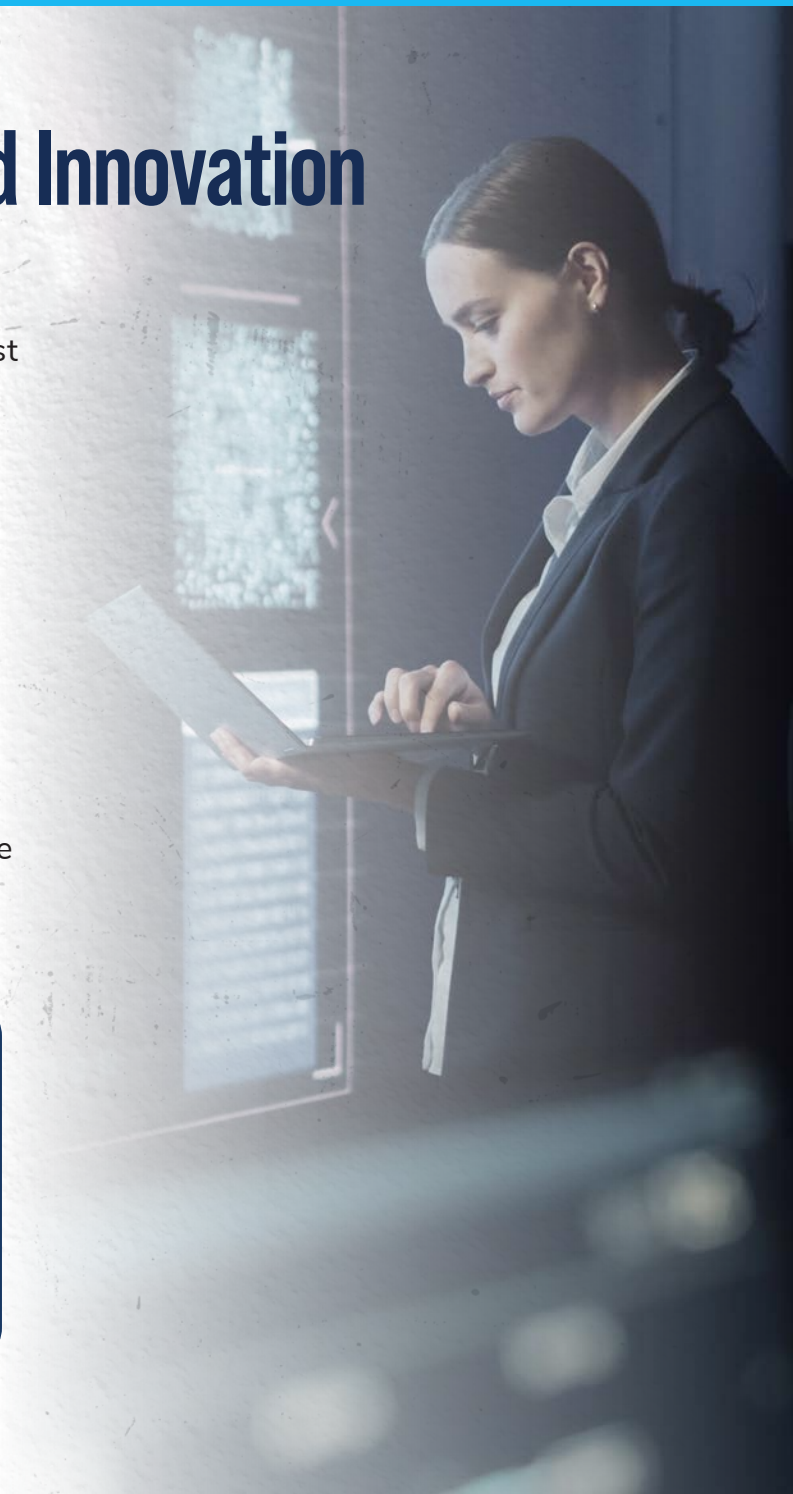
Collaboration Drives Productivity and Innovation

Frost & Sullivan research shows that almost all enterprises are accelerating the adoption of their digitalization strategies. The drive began almost immediately in response to the COVID-19 pandemic, but it has now become table stakes for most businesses as they look to remain competitive in an ever-changing marketplace.

In 2020, many industries underwent a sudden, mandatory digital transformation in just a few months. Their investments were often ad hoc, without concern for enterprise-level or end-user requirements. As a result, these companies enabled collaboration in some ways but made it more difficult in others—especially when lines of business deployed siloed applications that prevented them from easily sharing information and knowledge across the organization.

Many companies also neglected to collaborate with key stakeholders before deploying new technology, and they continue to ignore this critical input as they make investments for the future. But the only way to successfully manage digital transformation is to work with line-of-business managers and end users to ensure their needs—and thus, the needs of the business—are being met. Without their participation, any new initiatives are likely to fail.

The supply chain has changed—it has gone from a one-way, linear behemoth to an interdependent and intelligent web. That makes it more responsive and less prone to disruption, but only if your employees have real-time access to information and communication. Have you enabled your people and processes to succeed?





The Collaborative Workplace

Connected Work

MOBILE

- ▶ BYOX
- ▶ Mobile-first Technology
- ▶ Wearable Technologies
- ▶ IoT

PEOPLE-CENTRIC

- ▶ User Experience
- ▶ Flexible Work Practices
- ▶ Work-life Balance
- ▶ Global Talent Sourcing

CUSTOMER-DRIVEN

- ▶ Omni-channel Support
- ▶ Context Awareness
- ▶ Crowdsourcing

ENVIRONMENT-FRIENDLY

- ▶ Travel Reduction
- ▶ Remote Working
- ▶ Innovating to Zero

COLLABORATIVE

- ▶ Multi-modal Conversations
- ▶ Content Collaboration
- ▶ Social Features

AGILE

- ▶ Ubiquitous Connectivity
- ▶ Software-based Solutions
- ▶ Cloud Architectures
- ▶ WebRTC

CONTEXTUAL

- ▶ Single Pane of Glass
- ▶ User Identity-driven
- ▶ Persistent Conversations
- ▶ Analytics

Over the next two years, companies will focus on integrating AI technologies with cloud services to develop more robust solutions that let enterprises function with agility, even during a crisis. For example, if the system sees a shortage along the supply chain, it can reference historical and predicted demand trends to alert managers to the potential problem, and then analyze existing capacity and resources to suggest potential short- and long-term solutions.



Integration with Strategic Software Delivers ROI

The best way to capitalize on new technology is to let users access the new capabilities—right from within the tools they use every day to do their jobs. That kind of frictionless integration makes it easy for employees to take up the new software and services, seeing the benefits without having to break stride or recreate their own business processes. **The goal: Make processes, events, and workflows seamless within and across all lines of business at the organization.**

For instance, integrating back-office tools with communications and collaboration applications lets users manage conversations within email or teaming services while the system updates the relevant enterprise software—including enterprise resource planning, sales, and service databases and applications. It also ensures the data is available in all relevant systems, making it usable by a larger group of people whenever they need it.

In an integrated ecosystem, users can easily set up calls and meetings from within the enterprise software they use every day, without switching between applications. They can also see the information stored in those same enterprise systems right from their communications and collaboration applications—so if they're talking to a prospect, partner, or client, they don't need to move between applications to access (and act upon) up-to-date data. As an added bonus, all the information created as part of a communication, including shared documents, recorded audio, and written notes, can be linked to the enterprise tools for later use.





Pay Attention to Security, Performance, and Sustainability

Companies rightly demand a secure, flexible, and scalable infrastructure to meet all their business needs, regardless of the geographic location, user group, or network in play. When it comes to security, companies worry about data threats and theft, as well as compliance with relevant regulatory and privacy rules, including GDPR. They also insist on reliable performance that can deliver in today's global, hybrid, always-on-from-anywhere world—robust systems that can operate at scale to process data and algorithms in real time for users in multiple business units across the globe.

Companies also need an open platform that lets developers create the connections their business users want to boost productivity, improve the customer experience, and drive growth. Integration ensures users have access to critical data and communications from the tools they use every day, and if those aren't built in, they must be easy to create and manage.

Finally, executives are increasingly looking at sustainability as a key metric of IT success. Infrastructure must be cost-effective, energy-efficient, and allow companies to “green up” their operations without sacrificing reliability and performance.

Sustainability is top of mind for most corporate executives, and cloud computing can help companies go green. By using fewer data centers, locating them closer to sources of power, and investing in newer, energy-efficient hardware, cloud providers lower their environmental footprint, especially when compared to what individual businesses can do.



Key Investment Drivers for Enterprise Applications



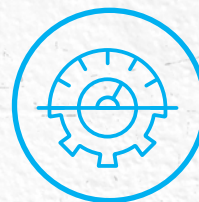
Giving employees, suppliers, and customers secure remote access from anywhere, on any device



Agility in a constantly changing world



Lowering the cost and complexity of expensive, over-provisioned data centers



Boosting speed while improving outcomes



Enabling real-time insights by sharing data across the organization



The ability to quickly innovate and deliver business value

Top Security Controls



Identity and access—secure user authentication and single sign-on



Application and data protection



End-to-end network security



Threat protection and security monitoring



Centralized management, including organization-wide compliance



The Cloud Can Get You There

Companies are moving their enterprise applications to the cloud as they embrace digital transformation. In a recent Frost & Sullivan survey of more than 800 IT decision-makers with responsibility for their companies' infrastructure and application management, 81% list moving to the cloud as a key initiative for their company, with 38% saying it is **the top priority**. Overall, respondents list the cloud as the most important factor in helping them achieve their business goals.



Cloud service providers are emerging as the key pillars in converging AI in the cloud ecosystem because they can offer value-added AI services and tools. Frost & Sullivan predicts that during the next 2–3 years, the public cloud will emerge as a major source of AI deployment. Its unique position in the value chain allows it to leverage AI to process, store, and manage large datasets.



Key Reasons Companies Move to the Cloud



Ease of use: Businesses need to give their employees access to advanced solutions without a lot of training and support.



Management simplicity: By outsourcing day-to-day management to the provider, IT staff can focus on delivering business value across the organization.



Access to advanced capabilities and scalability: Cloud deployments make it easy to start with the basics and expand capabilities as needed. They also guarantee that end users are always using the most up-to-date version of the software.



Reduced time to deployment: With cloud-based solutions, adding new users is almost instantaneous, allowing companies to enter new markets and quickly add or remove resources as needed.



Cost control: Cloud-based solutions can reduce system maintenance and management costs, and they don't require capital investment. Stakeholders know what they will be spending on their applications and infrastructure each month and can budget accordingly.



Advanced AI and analytics: The right cloud-based solutions deliver leading-edge analytics while letting companies store all their usable data offsite, boosting security and performance.



Support for the hybrid workplace: With more than half of all employees likely to continue to work somewhere other than a corporate office, companies must support both in-office and remote employees. Cloud services make that a breeze.



● PARTNER SPOTLIGHT ●

Fujitsu: The Right Partner for a Fast and Safe SAP Migration

Whatever the scale of your SAP transformation, Fujitsu has the global footprint, expertise, resources, and tools to deliver it.

Fujitsu has worked closely with Microsoft and SAP for more than 30 years, implementing and managing some of the largest deployments around. **The Fujitsu team is currently responsible for more than 3,000 SAP systems and 800,000 users.**

Having the right blend of credentials, processes, references, and skills is important to the team behind Microsoft Azure, too. With all that in place, Fujitsu is recognized as a Global Azure Expert Managed Service Provider and a specialization partner for SAP on Azure.

Migrating SAP to the cloud is always personal with Fujitsu—from an initial, tailored assessment to an exploration of how you can balance your security and troubleshooting needs. After all, every organization's journey to cloud is different, with unique legacy systems, goals, risks, and budgets. To address these differences, Fujitsu uses a tried-and-tested framework that centers on what makes each business unique.

The Fujitsu SAP on Azure assessment includes:



Discovery
of digital
estate



Definition of business
outcomes and challenges,
via interactive workshops



Evaluation
of cloud
maturity



Actionable
road map of
activity



Use a nuanced approach to application migration: Brownfield (upgrade as is to S/4HANA); Greenfield (build a new SAP environment from scratch); or BLUEFIELD™ (a blended approach on which applications and configurations move across)



● PARTNER SPOTLIGHT ●

Three Steps to a Quick, Smooth, and Risk-free Azure Migration

1

SAP'S CLOUD MOVE FOR AZURE

Organizations migrating to S/4HANA with a BLUEFIELD™ approach can automate the process for even the largest systems. In the hands of Fujitsu, SAP's Cloud Move for Azure solution determines the optimal cloud sizing to map an existing SAP system to a new Azure environment. You get the transparency to identify gaps in your migration and prepare what you'll need to fill them. With this cloud-centric, best practice approach, you can reduce a typical project from three months to just two.

2

AZURE NETAPP FILES (ANF)

Simplify your storage portfolio to deliver SAP projects faster, and future-proof your investments on-premises and in your hybrid cloud environment. ANF can help you make best use of your data and reduce your operational management costs.

3

SPRINGBOARD® FOR AZURE

Springboard® is our framework to accelerate your business toward agile practices and running a software-defined adaptive cloud platform on Microsoft Azure. The framework is engineered to seamlessly combine the design, deployment, and management of your migration Landing Zone in Azure, providing you with an everything-as-code solution for SAP on Azure.



The NBA Teams up with SAP and Microsoft for an Easy Layup

The NBA is known for bringing leading-edge technology to professional basketball. To expand the possibilities for innovative fan experiences and streamline day-to-day operations, the league chose to migrate its SAP solutions and other IT resources to Microsoft Azure and to use the RISE with SAP offering to facilitate its ongoing cloud evolution.

Embracing the cloud has been an important means of facilitating this transformation. Like many organizations, the NBA ran up against the limitations of an on-premises IT infrastructure. New hardware required time to procure and set up, and the seasonal nature of the sport meant that systems and applications see dramatic usage spikes during certain times of the year, placing a premium on scalability, reliability, and high availability. For an organization that takes a forward-looking approach to technology, the cloud was a perfect alternative.

“Microsoft has deep expertise running SAP applications on Azure, in addition to a strong, ongoing partnership with SAP, and that gave us confidence,” says Sahil Gupta, Senior Vice President and Head of Application Development at the NBA. “We looked very deeply at the security controls that Azure offers in conjunction with SAP, and we felt that it’s a platform we can trust.”

As the SAP migration progresses, the NBA is looking forward to the benefits of having data and applications co-located in Azure. “We’re excited by the possibilities that will come from having our business and non-business data, our fan data, and our game data all in a single repository,” says Gupta. “It’s exciting when technology is no longer a barrier to innovation, and we can finally act on our organization’s vision.”

“

To truly transform our organization, we need to do more than just build new websites and mobile apps. We need to change our culture and the way we think about technology, and we need to get into a mindset of constant disruption.”

—Sahil Gupta, Senior Vice President and Head of Application Development at the National Basketball Association



Standard Chartered Bank Leads by Example with Intel, Microsoft, and SAP

Already a leader in digital experiences among financial institutions, Standard Chartered Bank updated its digitalization and technology strategy in 2021 to derive 50% of its income from new businesses. The company took a three-pronged approach, and to that end it has doubled its yearly spending on strategic initiatives to \$1 billion. Standard Chartered is modernizing its core business systems and leveraging the agility, flexibility, and continuity provided by RISE with SAP to improve its decision-making across a complex network of international financial markets.

Standard Chartered has made operating synergy a focus of its DX initiatives. Its modern architecture, enabled by digital technologies, has helped score measurable improvements in three areas: the elimination of manual processes in its central treasury systems, the ways in which critical systems connect with each other and drive efficiency and employee productivity, and the consolidation and democratization of data that fuels real-time decision-making. The architectural backbone of RISE with SAP, powered by 3rd Gen Intel® Xeon® Scalable Processors and optimized with Intel® Optane™ persistent memory, is designed to give leaders the opportunity to make those improvements in the most frictionless way possible.

“Really good CFOs not only have a 360-degree view of the business and operations, but also a vision of the future—being able to identify new business opportunities while keeping risks under control. It’s not just about numbers, it’s about people, culture and technology.” —Andy Halford, Chief Financial Officer, Standard Chartered Bank.

Ultimately, the efficiency and opportunities for innovation facilitated by digital transformation benefit customers, too. “The starting point for me is always, ‘What would customers be delighted by? What would make their lives easier?’ Then, ‘What are the metrics that go with assessing that?’”

With the vast majority of SAP on Microsoft Azure customers running on Intel processors, customers benefit from pre-validated, certified SAP HANA cloud instances that help grow business value from faster insights, future-proof their cloud investments, and achieve high return on cloud investments.



Zespri Uses RISE with SAP and Microsoft Azure to Grow

As the world's largest marketer of kiwifruit, Zespri markets, distributes, and sells its fruit in more than 50 countries. The company has plans to expand its global supplier roster so consumers can enjoy its products year-round. As part of that effort, David Scullin, Chief Digital Officer at Zespri, developed a bold strategy to replace the company's aging ERP infrastructure with modern alternatives.

"We need to both minimize risk and build our business," Scullin says. "Although our systems have served us well, they're very old and very heavily customized, and a number of them can't be upgraded. They're way past their use-by date."

Zespri chose to migrate to RISE with SAP for its long-term, company-wide ERP solution. As Scullin explains, "We were already a heavy Azure customer, and we also had a relationship with SAP. We wanted to avoid the complexity of changing hyperscalers while also installing a new version of SAP, all in the middle of our transformation program." The sheer scale of SAP's hosted solution has a positive effect on Azure consumption costs for Zespri, as well.

Zespri is taking a phased approach. Phase one, currently underway, involves migrating part of Zespri's supply chain function, from shipping to retail shelves.

The second phase will focus on digital engagement and enablement for Zespri's community of 4,000 growers, as well as sales and the remainder of the supply chain and quality-management functions.

In the process, Scullin says, Zespri will gain a far more agile, responsive, and proactive stance toward future growth. Then he adds, "I actually meet people who haven't tried kiwifruit yet!" With his new online SAP operation, he plans to change that.

“

We wanted to focus on enabling our business strategy through technology so that we can continue to lead in marketing and distributing our wonderful, nutritious kiwifruit. We did an assessment, and we decided to take full advantage of both SAP's established expertise and our familiarity with Azure by adopting RISE with SAP, optimized on Azure."

—David Scullin



Doosan Builds a Better Workplace with SAP and Microsoft Azure

In the wake of the COVID-19 pandemic, Doosan, a South Korean provider of products and services to power-generation, desalination, engines, and magazine businesses around the world, recognized an urgent need to create cultures that encourage collaboration, feedback, and openness.

To meet the needs of today's hybrid workforce, Doosan has created a new employee experience called "Delightful Digital Workplace." The project integrates the continuous performance management functionality of SAP SuccessFactors Performance & Goals, SAP Business Technology Platform, and Microsoft Teams so employees and managers can share feedback in the flow of work. For example, after a meeting, employees can provide and request feedback through Teams on the topics discussed.

Co-creation of a seamless user experience means employees don't have to switch applications or interfaces. Instead of waiting for a check-in or missing an opportunity altogether, feedback becomes timely and contextualized. This helps employees improve their performance and increase productivity, and it helps managers make timely and informed decisions around employees' development.

Through Delightful Digital Workplace, Doosan has had the opportunity to interact with global teams at Microsoft and SAP, and gain confidence working on a global project. Robert Oh, executive vice president, Doosan Corporation, says the project itself demonstrated the power of having "committed and capable global partners to not only think about co-innovation ideas, but to execute them and make them happen."

SAP plans to continue innovating with Doosan and Microsoft to optimize Delightful Digital Workplace and explore new cases with SAP Business Technology Platform and Microsoft Teams.

“

The major intent of doing this first was improving the overall efficiencies, but more importantly improving our employee experience.”

—Robert Oh, Executive Vice President,
Doosan Corporation



Frost & Sullivan's Recommendations for Success

Not all cloud solutions are created equal, and it's important for IT and line-of-business teams to work together to find a partner that offers the services your business needs. Frost & Sullivan recommends adopting the following:

- ▶ **A single platform that's easy to deploy**, lets users leverage advanced features as soon as they are added, and ensures new users are up-and-running from day one
- ▶ **Support for remote and virtual workers** to easily enable a hybrid workplace
- ▶ **Advanced analytics and reporting** to leverage the public and proprietary data you're collecting every day. The goal: to seamlessly enable well-informed decisions, identify performance gaps, and improve the bottom line across the organization
- ▶ **Easy integration with other tools** so users can tap into collaboration and communications capabilities from within their back-office applications
- ▶ **A proven partner** with a long history in the industry, a forward-looking roadmap for new capabilities, and well-developed partnerships of its own with other providers in the marketplace.



To learn more, please visit SAP.com/Microsoft or Microsoft.com/SAP or Intel.com/SAP. →

For additional insights, you can also see the [Rise with SAP on Azure and Intel](#) on-demand webinar. →

GROWTH IS A JOURNEY. WE ARE YOUR GUIDE.

For over six decades, Frost & Sullivan has provided actionable insights to corporations, governments and investors, resulting in a stream of innovative growth opportunities that allow them to maximize their economic potential, navigate emerging Mega Trends and shape a future based on sustainable growth.

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