



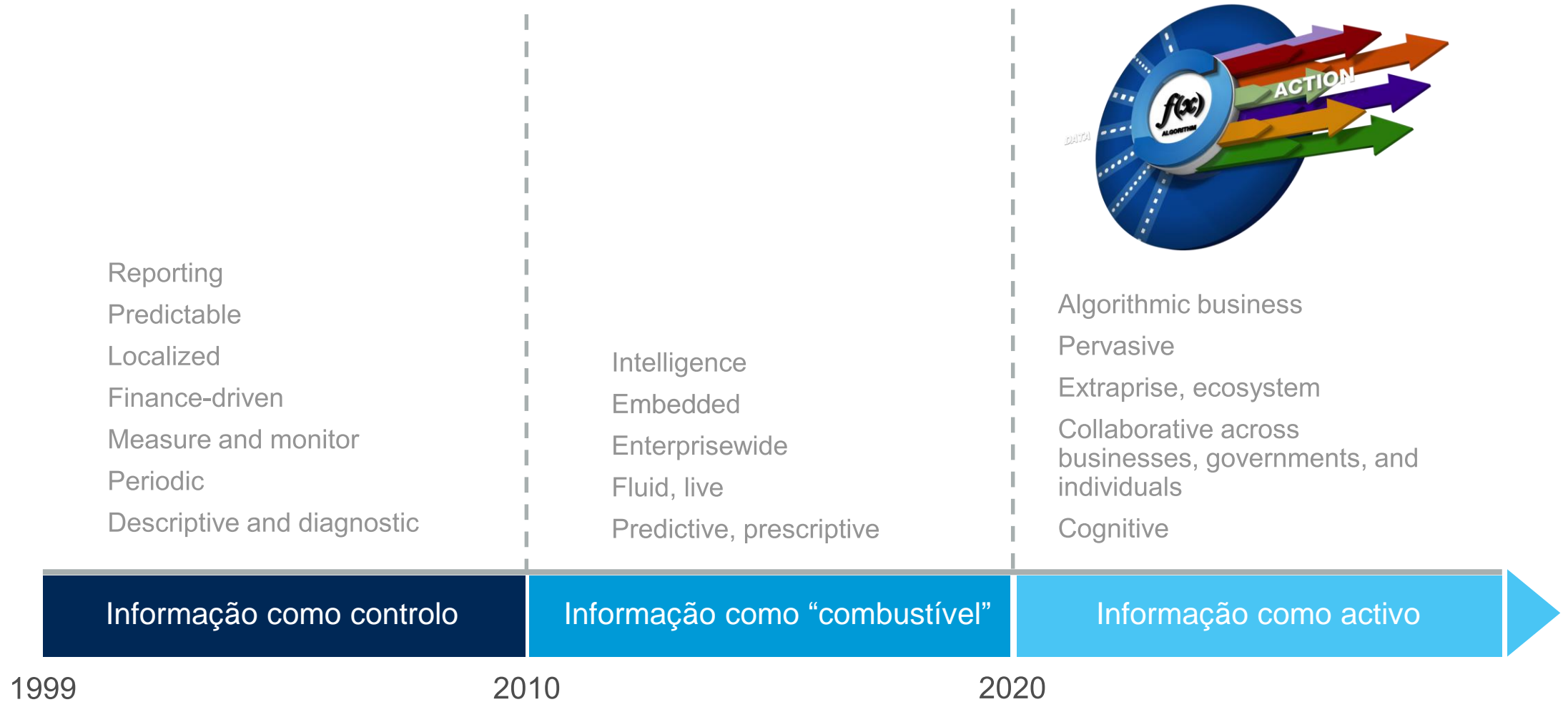
Liderança na transformação digital

Tiago Esteves
Congresso APDC, Setembro 2018

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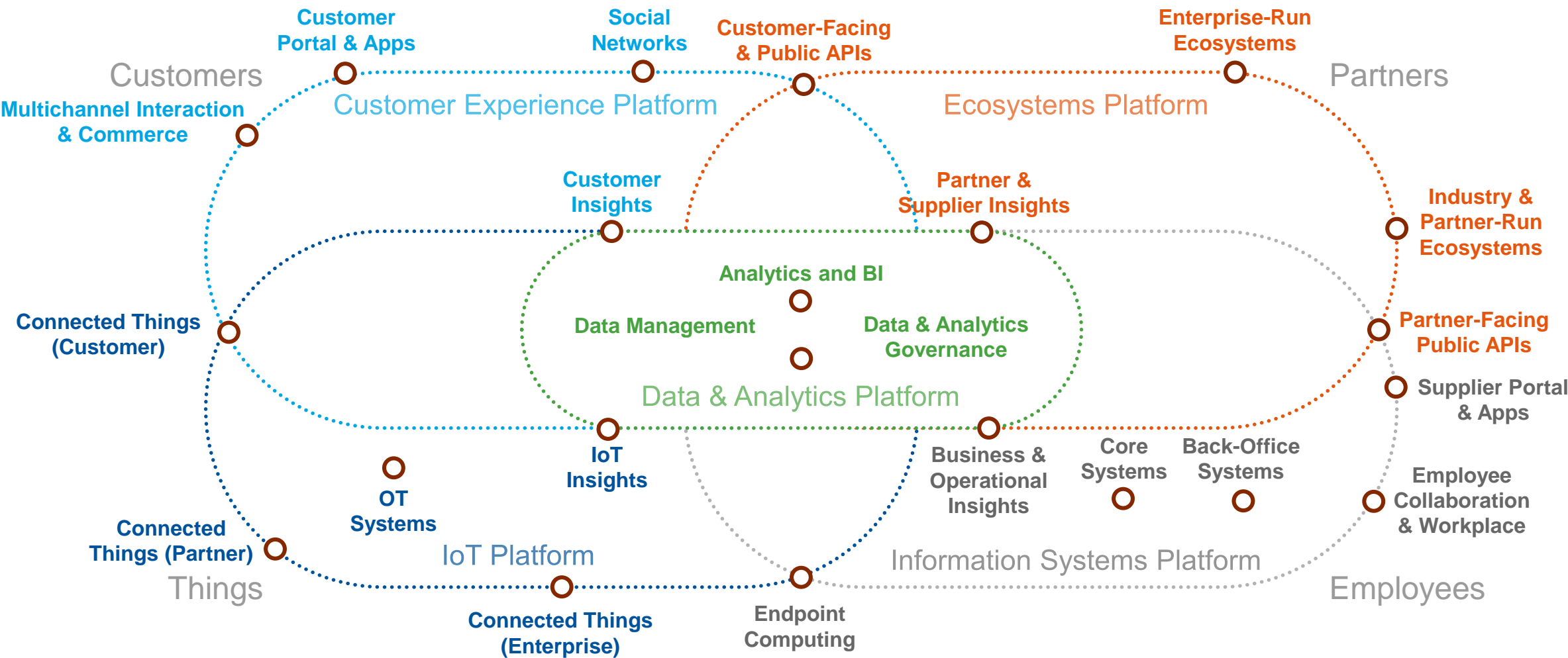
Gartner®

Os últimos 25 anos e o futuro próximo



Plataforma tecnológica para a Era Digital

A plataforma de Data & Analytics é a peça fundamental que suporta todos os negócios digitais



By 2022

30% of leading organizations

will formally adopt infonomics practices and value their information assets, maintaining a balance sheet for internal purposes.

Douglas Laney, Vice-President & Distinguished Analyst, Gartner

Crescimento *is the name of the game*

Crescimento e ganho de quota de mercado continuam como principais objectivos das organizações ibéricas

Principais objectivos corporativos



Rank	Spain and Portugal (n = 69)		Top Performers (n = 160)		Typical Performers (n = 2,281)		Trailing Performers (n = 174)	
1	Growth/market share	30%	Digital business/digital transformation	26%	Growth/market share	27%	Growth/market share	28%
2	Digital business/digital transformation	19%	Growth/market share	21%	Digital business/digital transformation	17%	Innovation, R&D, new products/services	9%
3	Profit improvement/ profitability/asset monetization	13%	Profit improvement/ profitability/asset monetization	14%	Profit improvement/ profitability/asset monetization	10%	Cost optimization/ management/reduction	9%
4	Corporate/M&A/new business/consolidation	10%	Technology initiatives/ improvements	11%	Innovation, R&D, new products/services	10%	Financial health	9%
5	Globalizing the business/ geographic expansion	10%	Customer focus	11%	Customer focus	9%	Profit improvement/ profitability/asset monetization	9%
6	Operations improvement/ efficiency/excellence	9%	Innovation, R&D, new products/services	9%	Corporate/M&A/new business/consolidation	7%	Technology initiatives/ improvements	7%
7	New customers/ retention/sales	7%	Corporate/M&A/new business/consolidation	8%	Technology initiatives/ improvements	7%	Customer focus	7%
8	Productivity/ optimization/efficiency	7%	New customers/ retention/sales	8%	Cost optimization/ management/reduction	6%	Corporate/M&A/new business/consolidation	7%
9	Customer focus	4%	Security, safety and risk	6%	New customers/ retention/sales	6%	Digital business/digital transformation	7%
10	Innovation, R&D, new products/services	4%	Globalizing the business/ geographic expansion	6%	Operations improvement/ efficiency/excellence	6%	Operations improvement/ efficiency/excellence	6%
Percentage of Respondents								

Fonte: ["2018 CIO Agenda: A Spain and Portugal Perspective"](#)

Aumento da visibilidade e das expectativas

Decisores acreditam, cada vez mais, na capacidade de Data & Analytics para transformar e diferenciar as suas organizações

Tecnologias que suportam a diferenciação da organização

Rank	Spain and Portugal (n = 78)		Top Performers (n = 165)		Typical Performers (n = 2,476)		Trailing Performers (n = 193)	
1	BI/analytics	28%	BI/analytics	28%	BI/analytics	26%	BI/analytics	20%
2	Digitalization/digital marketing	22%	Digitalization/digital marketing	17%	Digitalization/digital marketing	14%	Digitalization/digital marketing	12%
3	Internet of Things	9%	Cloud services/solutions	15%	Cloud services/solutions	9%	Enterprise resource planning	9%
4	Cloud services/solutions	6%	Mobility/mobile applications	7%	Mobility/mobile applications	6%	Cloud services/solutions	8%
5	Customer relationship management	6%	Artificial intelligence	7%	Internet of Things	6%	Customer relationship management	6%
6	Communication/connectivity	6%	Internet of Things	6%	Customer relationship management	5%	Internet of Things	6%
7	Application development	6%	Integration/interoperability	4%	Artificial intelligence	5%	Mobility/mobile applications	5%
8	Artificial intelligence	5%	Application programming interface	4%	Infrastructure/data center	5%	Infrastructure/data center	4%
9	Mobility/mobile applications	4%	Infrastructure/data center	3%	Enterprise resource planning	5%	Legacy modernization	3%
10	Enterprise architecture	4%	Security and risk	3%	Automation	4%	Integration/interoperability	3%
Percentage of Respondents								

Fonte: ["2018 CIO Agenda: A Spain and Portugal Perspective"](#)

Orçamentos traduzem a necessidade de investir

Organizações estão conscientes da necessidade de modernizar as suas plataformas para recolher os benefícios esperados

Áreas tecnológicas objecto de investimento em 2018

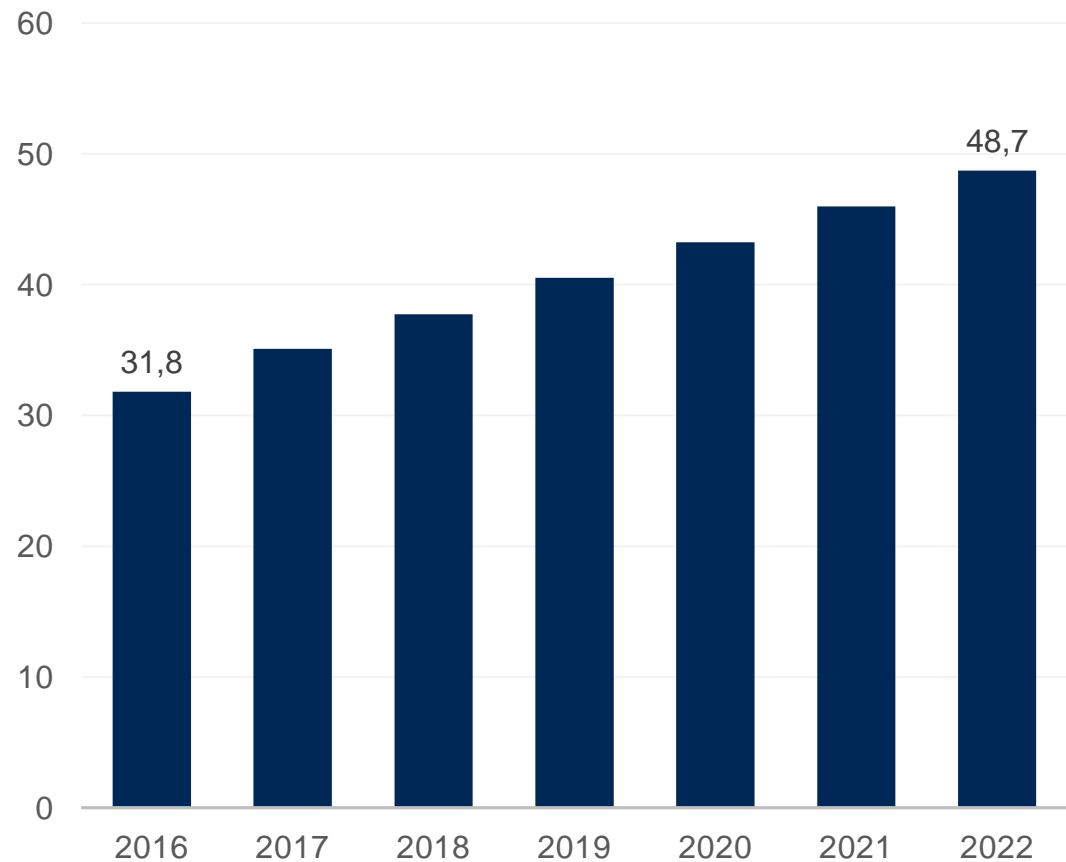
Rank	Spain and Portugal (n = 74)		Top Performers (n = 163)		Typical Performers (n = 2,496)		Trailing Performers (n = 188)	
1	BI/analytics	32%	Digitalization/digital marketing	21%	BI/analytics	19%	Cyber/information security	16%
2	Digitalization/digital marketing	23%	BI/analytics	20%	Cloud services/solution	13%	Enterprise resource planning	15%
3	Cyber/information security	18%	Cloud services/solution	15%	Digitalization/digital marketing	12%	BI/analytics	15%
4	Customer relationship management	14%	Artificial intelligence/machine learning	12%	Cyber/information security	11%	Cloud services/solution	9%
5	Cloud services/solution	9%	Mobility and mobility applications	9%	Enterprise resource planning	10%	Infrastructure and data center	9%
6	Artificial intelligence/machine learning	8%	Cyber/information security	8%	Infrastructure and data center	8%	Customer relationship management	6%
7	Communication/connectivity	8%	Internet of Things	7%	Customer relationship management	6%	Digitalization/digital marketing	5%
8	Enterprise resource planning	7%	Infrastructure and data center	6%	Mobility and mobility applications	6%	Data management	5%
9	Mobility and mobility applications	7%	System/process automation	6%	Networking, voice and data communications	5%	System/process automation	4%
10	Internet of Things	7%	Networking, voice and data communications	5%	E-commerce/website/client-facing	5%	Mobility and mobility applications	3%
Percentage of Respondents								

Fonte: ["2018 CIO Agenda: A Spain and Portugal Perspective"](#)

Mercado em evolução

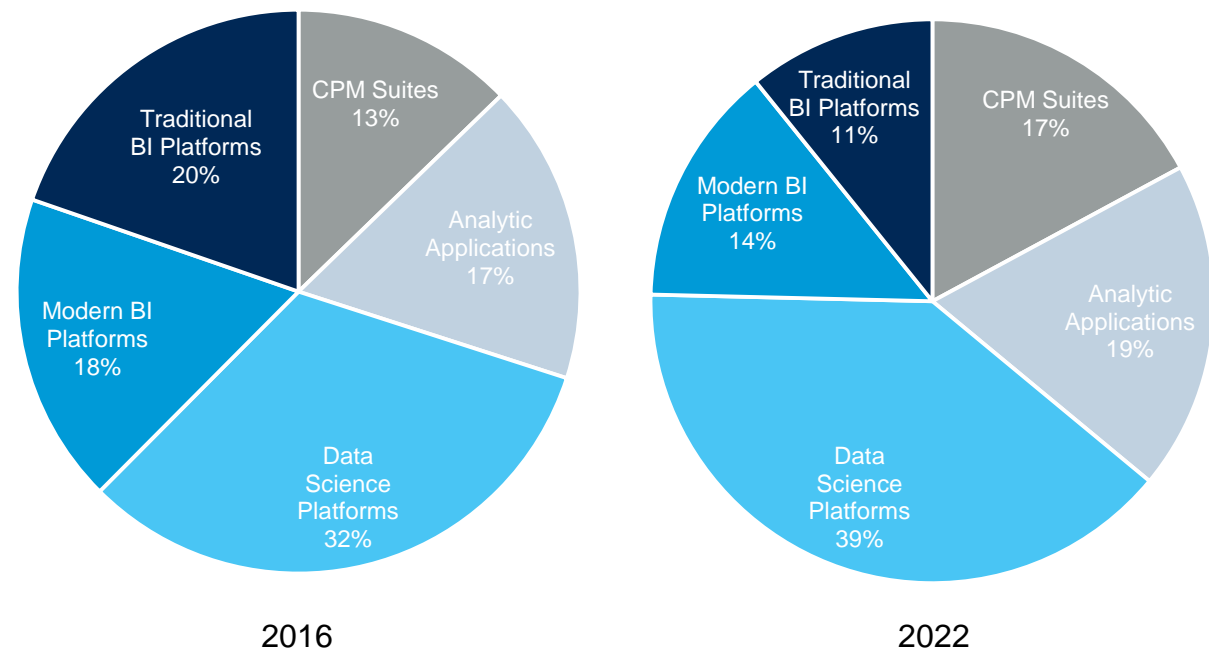
Aumento das expectativas induz crescimento e gera uma recomposição da estrutura do mercado

Mercado Analytics & Business Intelligence, Portugal



Fonte: [“Forecast: Enterprise Application Software, Worldwide, 2016-2022, 2Q18 Update”](#)

Breakdown por segment, Portugal

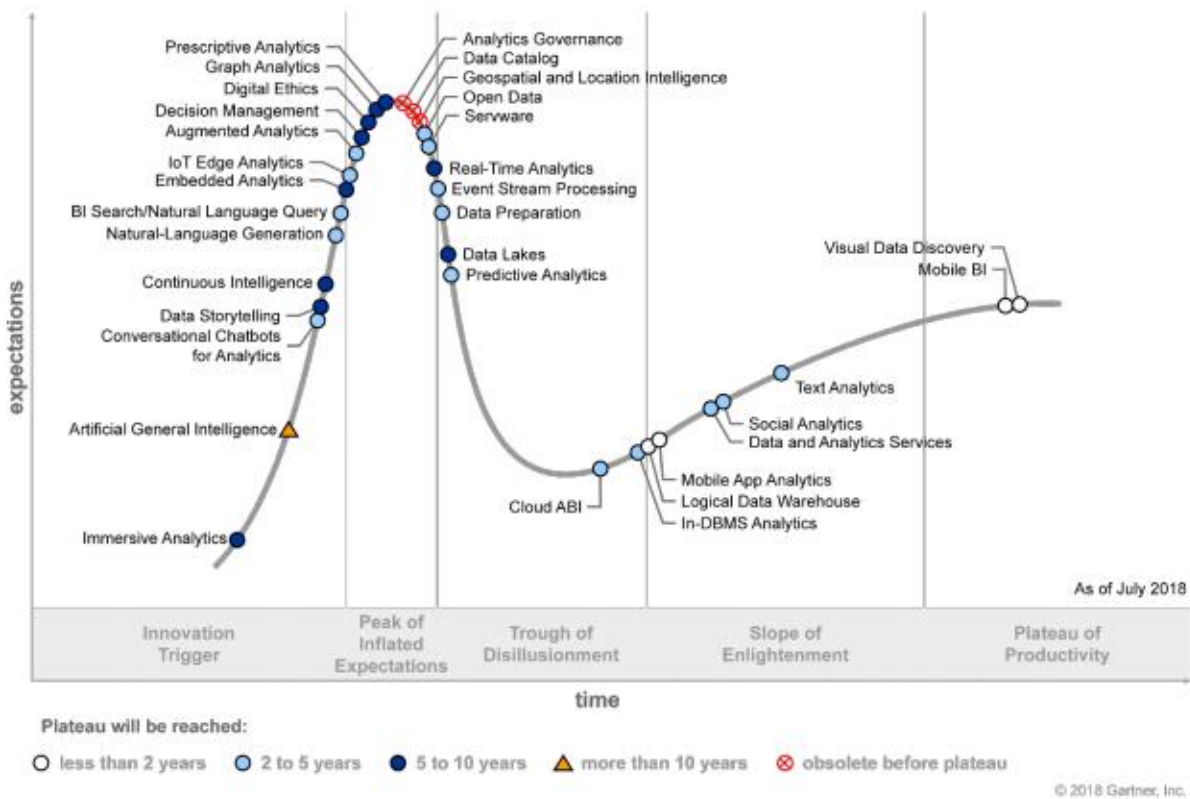


Fonte: [“Forecast: Enterprise Application Software, Worldwide, 2016-2022, 2Q18 Update”](#)

Para onde vamos a partir daqui?

Mercado complexo e em acelerada transformação onde as decisões de investimento necessitam de ser ponderadas

Hype Cycle para Analytics & Business Intelligence 2018



Fonte: [“Hype Cycle for Analytics and Business Intelligence, 2018”](#)

Matriz de prioridades

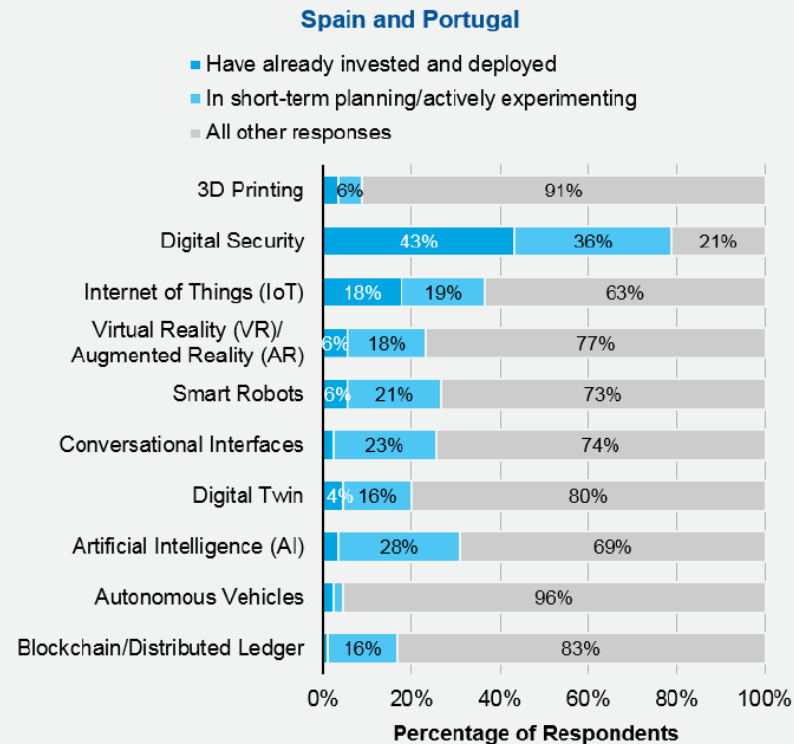
benefit	years to mainstream adoption			
	less than 2 years	2 to 5 years	5 to 10 years	more than 10 years
transformational		Augmented Analytics Event Stream Processing	Continuous Intelligence Immersive Analytics	Artificial General Intelligence
high	Logical Data Warehouse Mobile App Analytics	BI Search/Natural Language Query Conversational Chatbots for Analytics Data and Analytics Services Data Preparation In-DBMS Analytics IoT Edge Analytics Natural-Language Generation Open Data Predictive Analytics Servware Social Analytics	Data Storytelling Digital Ethics Graph Analytics Prescriptive Analytics Real-Time Analytics	
moderate	Mobile BI Visual Data Discovery	Cloud ABI Text Analytics	Data Lakes Decision Management Embedded Analytics	
low				
As of July 2018				

Fonte: [“Hype Cycle for Analytics and Business Intelligence, 2018”](#)

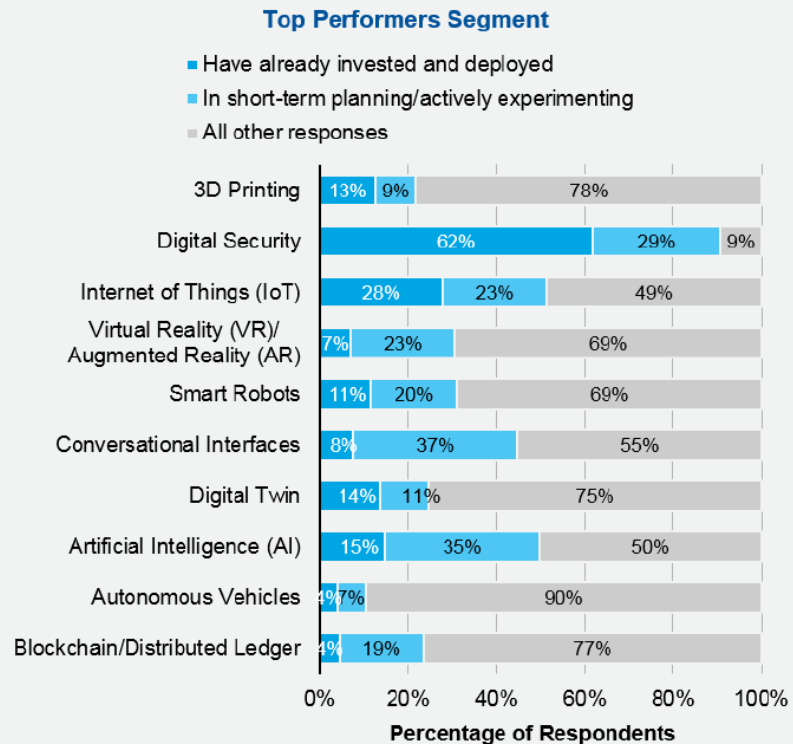
AI e IoT como áreas de investimento a curto prazo

Intenção de investimento em tecnologias emergentes

Plans for Emerging Technologies, 2018



Base: Region is Spain and Portugal, excludes DK, n = 90
What are your organization's plans in terms of the following digital technologies and trends?
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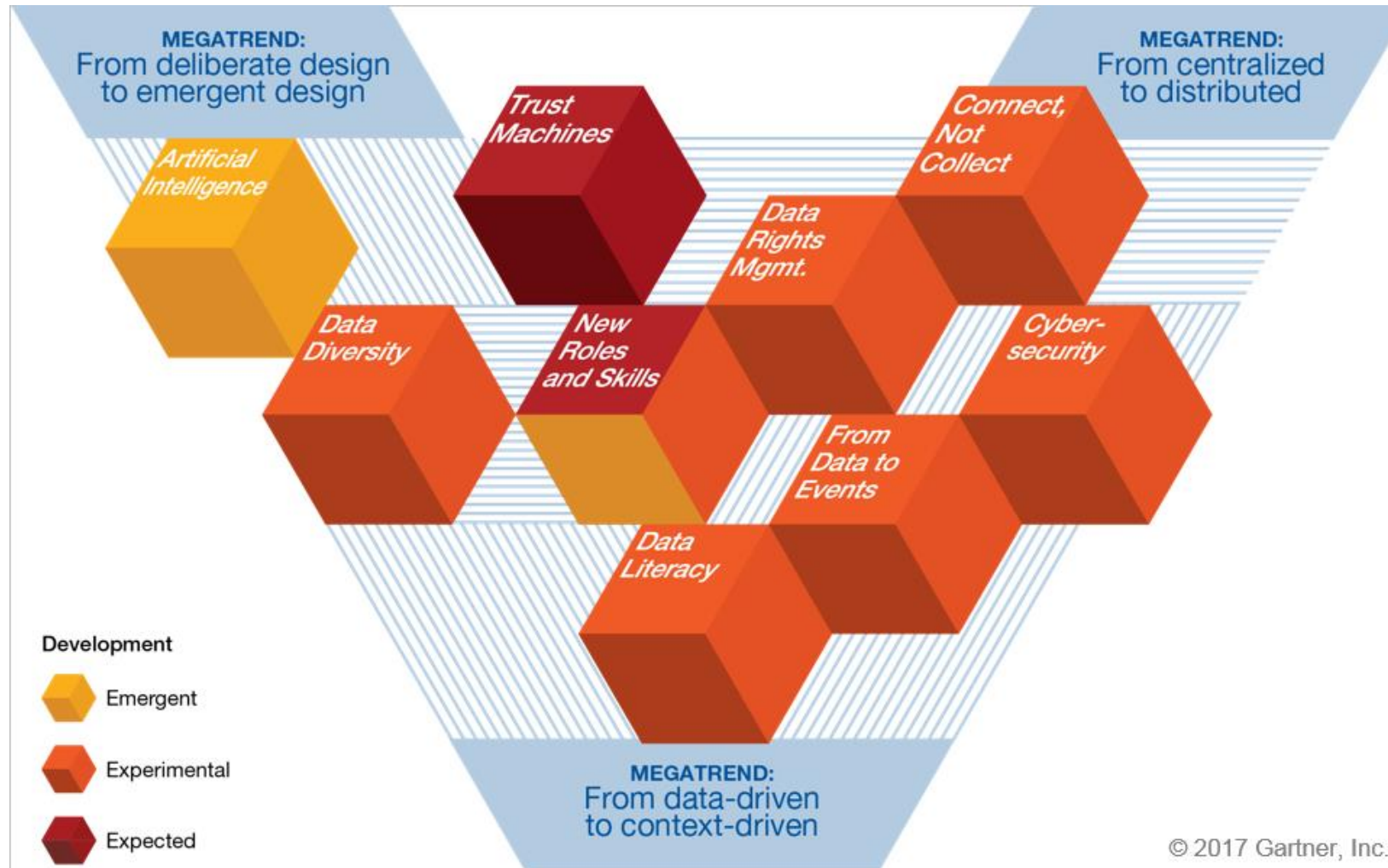


Base: Top performer segment, excludes DK, n = 183
What are your organization's plans in terms of the following digital technologies and trends?
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Fonte: ["2018 CIO Agenda: A Spain and Portugal Perspective"](#)

Mega tendências

Três mega tendências que vão enformar as ações das organizações *information-savvy*



Fonte: "[Tales From the Bleeding Edge — Trends Every Data and Analytics Leader Should Know About](#)"

Organizations are fooling themselves into thinking their data and analytics initiatives are truly about empirical decision making. We need substantial changes to our

decision-making culture

Hearts & Minds

Mais do que tecnologia, a implementação de uma organização data driven depende de alterações de mentalidade e comportamento

Ownership	▶	Stewardship	By product	▶	Product
Control	▶	Influence	Liability	▶	Asset
Securing	▶	Sharing	Truth	▶	Trust
Governance	▶	Enablement	No value	▶	Value
Compliance	▶	Ethics	Internal	▶	External

Fonte: ["Data and Analytics Leadership Vision"](#)

Algumas **recomendações**

- 1 Modernização da estratégia de *data & analytics*
- 2 Abordagem baseada em casos de uso, em *business outcomes*
- 3 Investimento em *data literacy*
- 4 Clarificação de papéis, responsabilidades e processos de *enablement*
- 5 Alavancagem de novas tecnologias

The greatest danger in times of turbulence is not the turbulence; it is to act with
yesterday's logic

Prof. Peter Drucker

Sugestão para leituras adicionais

- ▶ [The Chief Data Officer's First 100 Days](#)
Debra Logan and others
- ▶ [How Chief Data Officers Show Leadership in Influencing the Data-Driven Culture](#)
Alan Duncan and others
- ▶ [How CDOs Engage With Their Stakeholders to Deliver Real Business Value](#)
Alan Duncan and others
- ▶ [How to Establish a Data-Driven Culture in the Digital Workplace](#)
Alan Duncan and Frank Buytendijk
- ▶ [Driving Business Transformation by Changing the Culture](#)
Bard Papegaaij and others
- ▶ [Building a Digital Business Technology Platform](#)
Hung Lehong and others
- ▶ [100 Data and Analytics Predictions Through 2020](#)
Doug Laney

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