

SEEING THINGS DIFFERENTLY



E-BUSINESS MATURITY BENCHMARK 2008

**Start optimizing your E-Business organization,
using the E-Business Maturity Model**

White Paper

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PREFACE

Based on our discussions with customers and experience from our projects, we see that businesses find themselves facing numerous questions concerning the maturing of their E-Business organization. Especially in the light of recent market developments, performance optimization of the E-Business organization is now more important than ever.

Themes we encounter include: How does my E-Business organization perform? How do we measure up against our sector and/or best practices? Are we able to successfully sustain E-Business? How is E-Business adding value to our organization and how can we capitalize on this? Do we have what it takes to take the next step, and what do we need to focus on?

To help organizations understand where they are, which steps need to be taken to improve and let them benefit from benchmarking against cross-industry best practices, Atos Consulting initiated the E-Business Maturity Benchmark 2008. Held between August and October in total 112 complete responses were received, covering a cross section of management levels, functions and sectors. This makes the results of the E-Business Maturity Benchmark 2008 representative for the Netherlands.

We find that the results can serve as the basis to start the discussion between departments, as a reference or as an inspiration to start improving your E-Business organization. Hopefully, you will agree and gain some new insights in E-Business maturity relevant to your organization.

This publication would not have been possible without the commitment of the research team. Over the past months a lot of energy, discussion, resourcefulness and above all hard work have been put into it. But I feel the end result is certainly worth it. Thank you all. Enjoy reading the paper.

Gijsbert van der Sleen
Atos Consulting N.V.

MAKING SENSE OF IT ALL

With ever growing internet use worldwide, E-Business is becoming increasingly more important. The online component is strategically important to organizations, as it impacts all customer facing business processes.¹ This leads to:

- > a different way of engaging customers
- > a new way of communicating and interacting in your enterprise
- > an alignment of operational habits to enable and adopt to these changes

After the initial struggles with E-Business initiatives, early successes (and failures), and the collapse of the internet hype, businesses find themselves facing numerous questions in maturing their E-Business organization:

- > How does my E-Business organization perform?
- > How do we measure up against our sector and/or best practices?
- > Are we able to successfully sustain E-Business, and how mature are we anyway?
- > How is E-Business adding value to our organization and how can we capitalize on this?
- > Do we have what it takes to take the next step, and what do we need to focus on?

To complicate things even more, E-Business business objectives vary widely across organizations and sectors. The most common include:

- > Branding
- > Sales
- > Streamlining business processes
- > Reducing costs
- > Improving customer service quality
- > Opening new distribution channels

Organizations face many challenges to realize their objectives as best they can. The complexity comes from multi-functional and cross-organizational coordination. Because of this organizations are not realizing their full E-Business potential. Overcoming these challenges is what we call the road to E-Business maturity.

WHY WE CREATED THE E-BUSINESS MATURITY BENCHMARK

As organizations go through different stages of E-Business maturity, they are faced with similar challenges when integrating E-Business in their processes. In order to ensure they are taking the right steps, they must validate with other organizations, peers or competitors. Because all organizations undergo the same challenges, their development steps can be captured as stages of maturity. The idea is that all organizations pass through similar stages of maturity with respect to the way they use and manage E-Business to support and facilitate business goals, processes and operations. These stages are defined and captured in the Atos Consulting 'E-Business Maturity Model'.

The Atos Consulting E-Business Maturity Model:

- > Determines where organizations are
- > Identifies high-priority improvement actions which need to be taken to improve their current maturity stage
- > Clarifies which steps need to be taken to grow to a next stage
- > Offers organizations the benefit of benchmarking against cross-industry best practices

The fundamental value proposition is that greater E-Business maturity is linked directly to improved results in terms of an organization's ability to predictably execute E-Business initiatives and processes and achieve high returns on its investment in E-Business.

It is important to understand that although the 'E-Business Maturity Model' describes in what manner and at what organizational level for example the E-Business strategy is developed, it does not provide insight in the validity of the chosen strategy! For this, there are several influencing environmental and organizational factors such as the products and services, market, customers and government.

Atos Consulting offers a framework for online success, which examines online strategy, organization and performance in close coordination.

¹ We define E-Business as: all customer facing business processes using internet technologies.

THE 'E-BUSINESS MATURITY MODEL' HANDLES THE ORGANIZATIONAL ASPECT OF E-BUSINESS

THE E-BUSINESS MATURITY BENCHMARK 2008

To support organizations in finding the answers to their questions, Atos Consulting used the 'E-Business Maturity Model' as the basis for the 'E-Business Maturity Benchmark 2008'. The main goals were to create:

- > A benchmark of the current stage of E-Business maturity in the Netherlands
- > A benchmark of organizations within selected sectors
- > Best practice recommendations to guide organizations in their E-Business maturity

Our key target audience were primarily large organizations (top 500), running their global or European organizations from the Netherlands. Respondents which were invited to participate are executives and managers with customer facing processes with a primary responsibility for driving E-Business strategy and implementation within their organization.

- > 222 respondents participated in the benchmark
- > Not all participants filled out the questionnaire completely or after the closing date
- > This report is based on 112 completely filled out and validated questionnaires

What we found was, that because of the open nature of the benchmark (we used blog postings on Marketing-facts, Molblog and MAXX//online to invite participants), our respondents represent a cross section of the Dutch market.

This approach provided us with a broad distribution of management levels of the respondents. Board level management and senior management level respondents cover around 50% of all participants. This enables us to assess how E-Business is integrated in at the different organizational levels and how their perceptions differ.

Figure 1: Please indicate your job level

Management level of benchmark participants

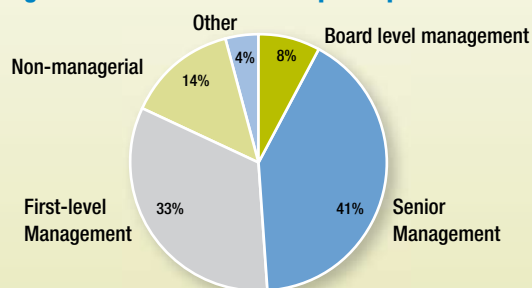


Figure 2: Could you provide us with your job title? (categorized answers)

Complete decision making unit covered

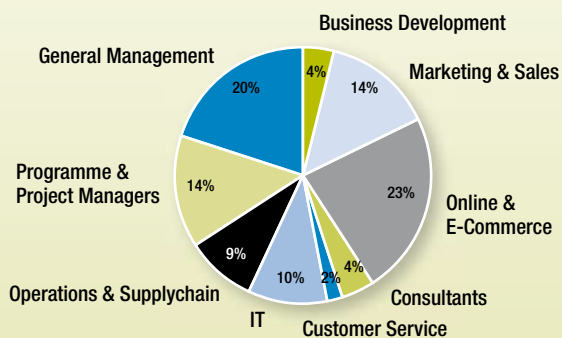
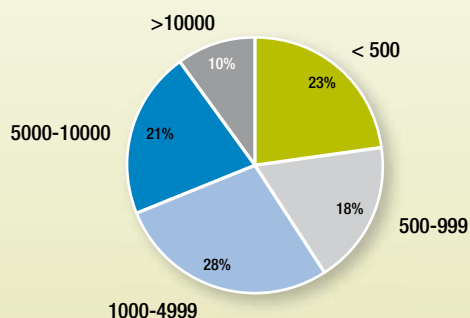


Figure 3: Please indicate your organizations' (the legal entity) number of employees

Number of employees of participating organizations

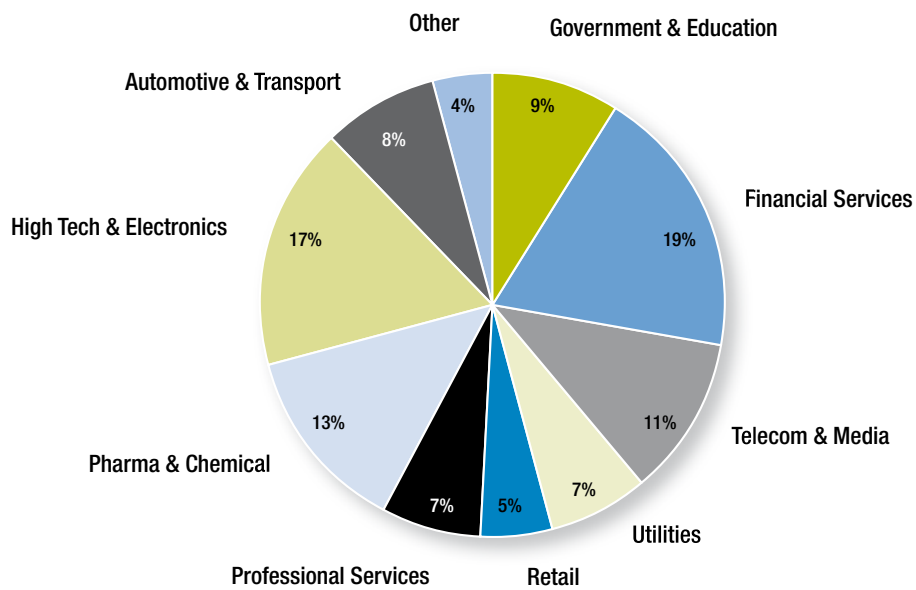


Also the size of organizations measured in number of employees has an even distribution. This way we can assess whether there is a difference in maturity levels for different organization sizes. Interestingly enough, we found that there are no significant differences in their maturity stage, drivers or challenges.

ORGANIZATIONAL SIZE DOES NOT IMPACT E-BUSINESS MATURITY STAGE, DRIVERS OR CHALLENGES

Figure 4: Please select your sector/market (categorized answers)

Benchmark identifies ten sectors



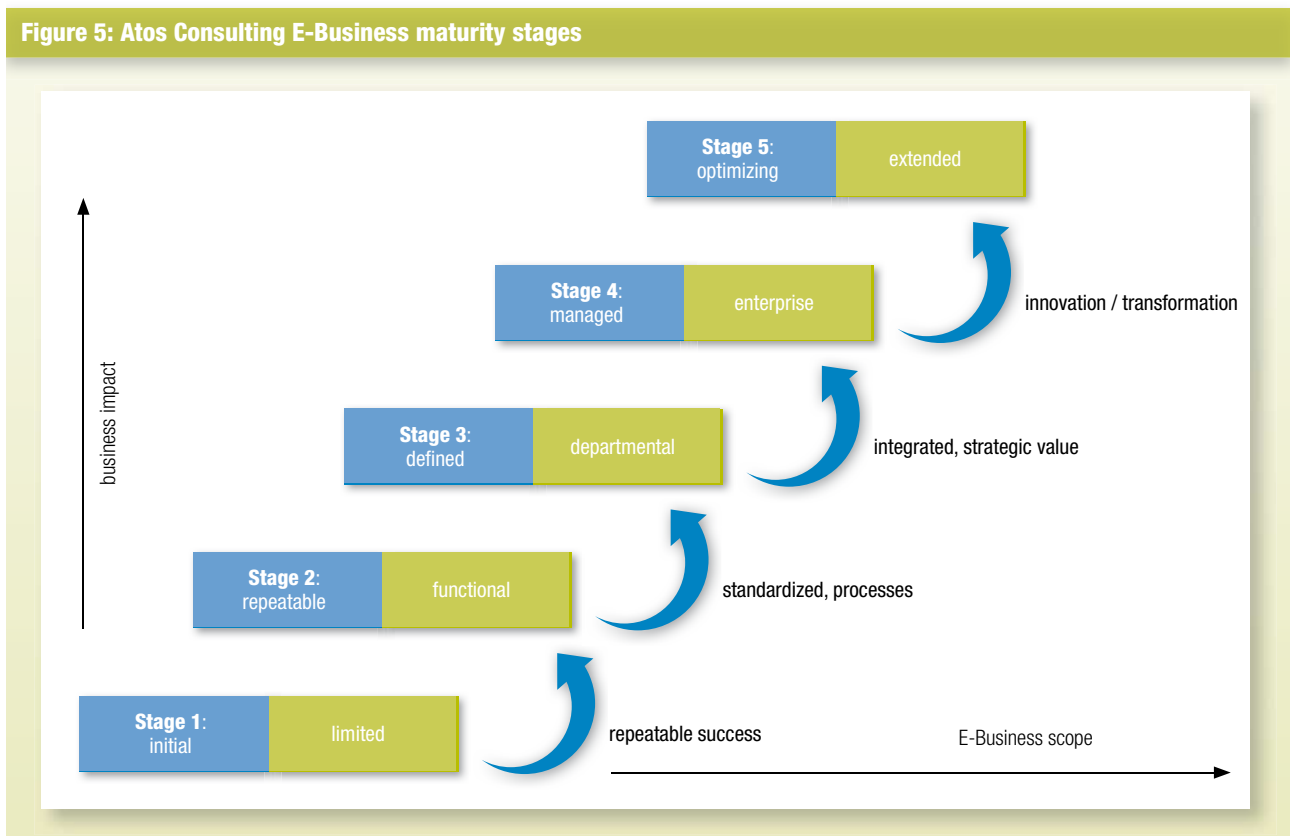
THE E-BUSINESS MATURITY MODEL

Atos Consulting uses the Business Development Capability Maturity Model (BD-CMM) for Business Development as the basis² for the E-Business Maturity Model. The BD-CMM identifies five maturity stages, in which dimensions evolve from an ad hoc, undisciplined state into a disciplined, optimized state. An increase in maturity, assumes an increase in the degree of capabilities in management, understanding, and expertise.

E-BUSINESS MATURITY STAGES

Based on the BD-CMM, the 'E-Business Maturity Model' stages are identified as: Initial, Repeatable, Defined, Managed and Optimizing.

Figure 5: Atos Consulting E-Business maturity stages



The Initial stage

At the initial stage, the E-Business initiatives are unplanned, driven by single independent managers, who see the direct added value to their business. New initiatives typically operate without formalized procedures and success depends on individual effort. Due to lack of comparative metrics, the added value of project efforts can only be assessed subjectively. Essentially, the organization lacks the capability to meet commitments consistently.

The Repeatable stage

At the repeatable stage, realistic project commitments are defined based on the results observed on previous projects. Because the projects are defined, the functional involved managers are able to track costs, schedules and functionality. In addition, these management controls allow visibility on the project's output towards the involved department, but there are only limited channel-specific objectives. This means that there are only limited specific objectives for the E-Business function as a part of other customer-orientated processes.

² Capability Maturity Model for Business Development, Version 1.0: Carnegie Mellon University, 2004.

Due to the experience with previous projects, processes are based on repeatability of previously executed projects within the same business function. The ability to control repeatable projects is the strength of the business process during this stage. This short term focus also creates a weakness hiding in the fact that prior gained experience is too limited for adequate long-term planning.

The Defined stage

Within the defined stage, E-Business has been adopted as one of the organization's processes under control of a department. There is a central E-Business strategy and planning process. The organization has achieved a foundation for the E-Business function, by defining and controlling its specific processes. In this stage, specific channel objectives are set, measured and steered. Its processes are based on a department standard of the activities, roles and responsibilities in the defined process.

The Managed stage

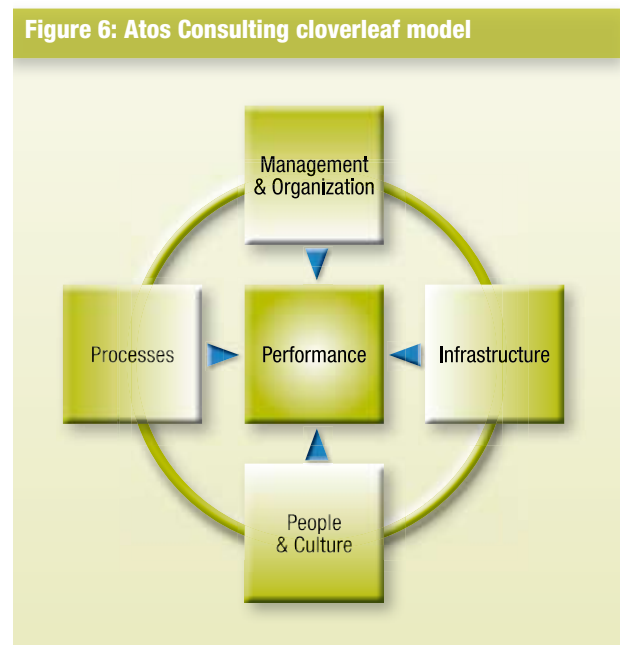
Here, E-Business becomes a predictable organizational asset. The organization defines quantitative and quality goals for the E-Business processes. Its processes are based on a common organization-wide standard of the activities. This allows an organization to predict trends in process quality. Because E-Business occurs across the organization's operations, it enables the management board to identify progress and problems. In this stage co-operation exists between different organizational departments (after-sales service, marketing, sales) and different organizational functions (IT, marketing, E-Business). Complementary departments and functions within an organization ought to be tightly linked; redundancy of knowledge and expertise may be desired to create cross-functional capacities.

The Optimizing stage

At the optimizing stage, the organization is focused on continuously improving its E-Business capabilities within the enterprise. E-Business activities exist throughout an organization's value chain and improve coordination among its activities in order to complement one another. Therefore this last stage in E-Business development focuses on adding value to value chain activities. E-Business tends to be multifunctional and multi-organizational, necessitating the capability to build the commitment of internal and external stakeholders.

E-BUSINESS MATURITY CATEGORIES

Atos Consulting uses the standard clover leaf approach to describe the key organizational dimensions which need to be aligned in any organization project in order to be successful. These categories are: Management & Organization, Processes, People & Culture, Infrastructure. Ultimately, balancing the categories and the activities as a whole, result in value for the organization.



Management & Organization

This category measures the level of management involvement. Management & Organization is concerned with choices that focus on organizational governance. This means it focuses on the authority level and ownership regarding the E-Business function. It defines who has the authority to make E-Business decisions, set priorities and allocate resources. Consequently, the organizational commitment across departments is determined. When different departments and the different organizations in the value chain are considered, E-Business is fully utilized.

The category is divided in:

Vision & Strategy

- > How and where are the E-Business vision & strategy formulated?

Leadership & Commitment

- > Who sponsors E-Business initiatives?

Governance & Organizational alignment

- > Who is responsible for E-Business?

Processes

This category measures the extent to which the E-Business processes are formalized, documented and integrated with traditional workflows. Processes should be described according to the organizations or value chain partner's standard. Describing more processes accordingly, enables coordination and alignment with other departments or external partners.

Also the process measurement and resource allocation is important to consider. Unless these capabilities are in place across the organization, it will be impossible for the organization to assess the performance of its processes. An organization must know exactly what drives E-Business performance, and allocate its budgets accordingly. This implies that measurement data relating to E-Business processes has to be monitored, evaluated and used to direct change.

The category is divided in:

E-Business process

- > Are E-Business processes well defined in line with existing business standards?

E-Business Performance Measurement

- > Is E-Business performance measured on multi-channel objectives?

E-Business Cost Management

- > How are E-Business costs measured and steered?

People & Culture

This category focuses on the involvement of the employees and the organizational culture towards the value of E-Business. Organizational culture is the notion of common values of behavior and communication in the organization.

E-Business success depends on the capacities and skills of the employees, internal communication and leadership styles. Achieving cross departmental alignment requires solid working relationships and effective com-

munications. Breaking down of the so-called organizational silos depends on this. Open communication ensures cross-functional departments to work together more successfully.

The category is divided in:

Culture

- > Do employees encourage new initiatives and share best practices?

Competencies

- > Is involved with the skill level and competency development of employees

Communication

- > Are experiences shared frequently with respect to E-Business initiatives?

Infrastructure

E-Business initiatives always fundamentally involve Infrastructure. This means that new E-Business initiatives depend on the IT organization's ability to provide the necessary tools and services.

When implementing IT-demanding initiatives like E-Business, it is important the IT and the business function are integrated. If this integration is lacking (on all levels, from strategic to operational), it will be impossible to capitalize on E-Business initiatives.

The category is divided in:

IT Strategy & Vision

- > Is E-Business part of the IT strategy and roadmap?

IT Architecture & Infrastructure

- > What are the challenges in integrating front and back office applications?

Business & IT alignment

- > Are the business (objectives) of E-Business and IT aligned?

THE ATOS CONSULTING E-BUSINESS MATURITY MODEL

Combining the maturity stages and the Atos Consulting clover leaf leads to the 'E-Business Maturity Model'.

Table 1: The Atos Consulting E-Business Maturity Model

	1: Initial E-Business unplanned	2: Repeatable E-Business aware	3: Defined E-Business managed	4: Managed E-Business integrated	5: Optimized Extended Enterprise
Management & Organization	Vision & Strategy	> E-Business not part of business strategy > Vision and strategy functional focused (short term)	> Corporate E-Business strategy defined	> E-Business and strategy communicated an integrated in goals and objectives setting of departments	> E-Business is part of business strategy and achieves business goals > Focus on extended enterprise > Steering on compliance with strategy
	Leadership & Commitment	> Driven by initiative champions > Driven by cost & efficiency	> Benefits of E-Business clear > Focus on streamlining processes (cross-functional/ process coordination)	> Benefits of E-Business clear > Driven by strong business/ benefits case	> The interactions and financial contribution of different channels are well understood > Entrepreneurial, anticipating the market
	Governance & Organizational Alignment	> No explicit governance model > Local initiatives (grass root) > Low-level managed > Functional focus	> Hierarchical management structure > Towards centralized E-Business function (profit centre) > E-Business incorporated in corporate annual business planning process	> Direct channel organization P+L responsible > Towards centralized competence centre (functional) expertise > Central budget to support strategic development	> Towards decentralized E-Business function > Central excellence centre (cost centre) > E-Business supported with local (functional) expertise > Co-creation of products and service using the online channels
	E-Business Process Definition/Integration	> No E-Business process definition > Experimentation with new channels	> Core E-Business processes are established > Focus on streamlining processes (cross-functional/ process coordination) > Limited reporting and analysis	> E-Business integrated in business processes established > E-Business ownership across process areas > Centralized procurement of E-Business services	> Externally integrated process
	E-Business Performance Measurement	> Limited measurement: little insight, both for projects as channel	> Periodic measurement and reporting > Limited channel-specific objectives in planning > Some data collected, but unlikely to be reviewed or actioned	> Specific channel objectives set by department (annually) > Functional/departmental performance measures > Performance improvement initiatives > Planning and reporting per department based on KPIs	> Multi-channel objectives > Steering based on continuous measurement and reporting > Customer focused initiatives > Planning and reporting based on KPIs per process and per department
People & Culture	E-Business Cost Management	> Limited insight in costs, cost drivers and revenues > Steering on budget	> Control on departmental cost drivers	> Portfolio analysis > Control on process cost drivers and internal SLA's	> Control on external SLA's
	Competencies	> No clear E-Business resources in business > Subject matter expertise based on personal skills	> Initiated trainings in E-Business activities and processes	> E-Business skills developed within the business and standard part of training > Centralized specific knowledge on E-Business initiatives	> Centre of Excellence (central) setting standards and sharing best practices > Competency development based on the contribution to online channels
	Culture	> E-Business unaware > Experimentation > E-Business believers vs skeptics	> Senior team-members responsible for encouraging adoption of E-Business throughout organization. > E-Business encouraged on the basis of rewards (acceptance issues)	> Acceptance of E-Business (value added is seen)	> A culture exists that encourages E-Business > E-Business personal performance based on KPI's
IT & Infrastructure	Communication	> Based on personal interests (free format community)	> Formal communications (department) > Periodic, between departments	> Open communication, aimed at mutual results	> Information exchange aimed at the customer (co-creation, partnership)
	IT Strategy & Vision	> No explicit E-Business vision and strategy > Experimentation	> IT strategy aligned with business strategy > Strategy aimed at rationalization of E-Business applications	> Strategy aimed at internally integrated systems > Control based on SLA's > Full IT service catalogue	> Strategy aimed at integrated systems (internal & external) > Vendor monitoring and feedback to strategy based on market developments
	IT Architecture & Infrastructure	> Islands of automation > Legacy enterprise system(s)	> Limited integration for specific initiatives > Multiple platforms for content management, web analytics, etc. > Preferred-supplier list of digital agencies	> Enterprise E-Business systems enable reliable, consistent and up-to-date information > Towards single source of information (redundancy eliminated)	> Corporate IT infrastructure integrates E-Business management both internal and external to the organization > Possible outsourcing of architecture and development
Business & IT Alignment	> Main responsibility typically within IT > Technology based projects, > Islands of automation	> Functional based projects > Islands of automation > Limited integration	> Business case based improvements to initiatives > Limited alignment with business requirements	> Towards full IT and business alignment > Business case based improvements to initiatives	> Full business and IT alignment > Business case based improvements to initiatives

THE ROAD TO MATURITY: DRIVERS AND INHIBITORS

E-Business maturity development cannot be seen as a standalone within organizations. There are several internal- and external factors influencing the maturing of the E-Business organization. The internal environment consists of: Market Orientation, Competitor Orientation and Customer Orientation, Future Orientation, Organizational Innovativeness and Top Management Emphasis.

The external environment, consisting of Customer Power and Institutional Power, is pressuring organizations to invest in E-Business initiatives. Each factor can be both a driver and an inhibitor for E-Business maturity.

Figure 7: E-Business Maturity drivers and/or inhibitors

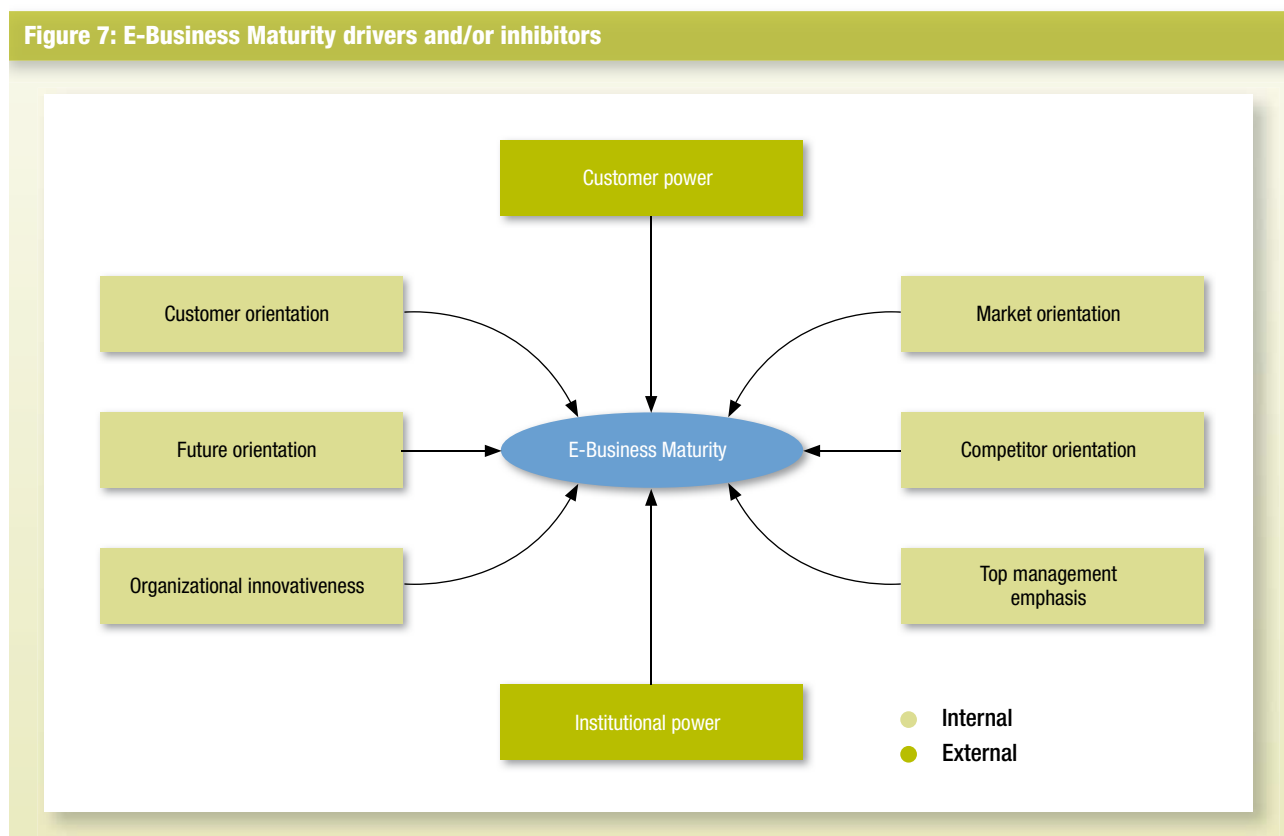
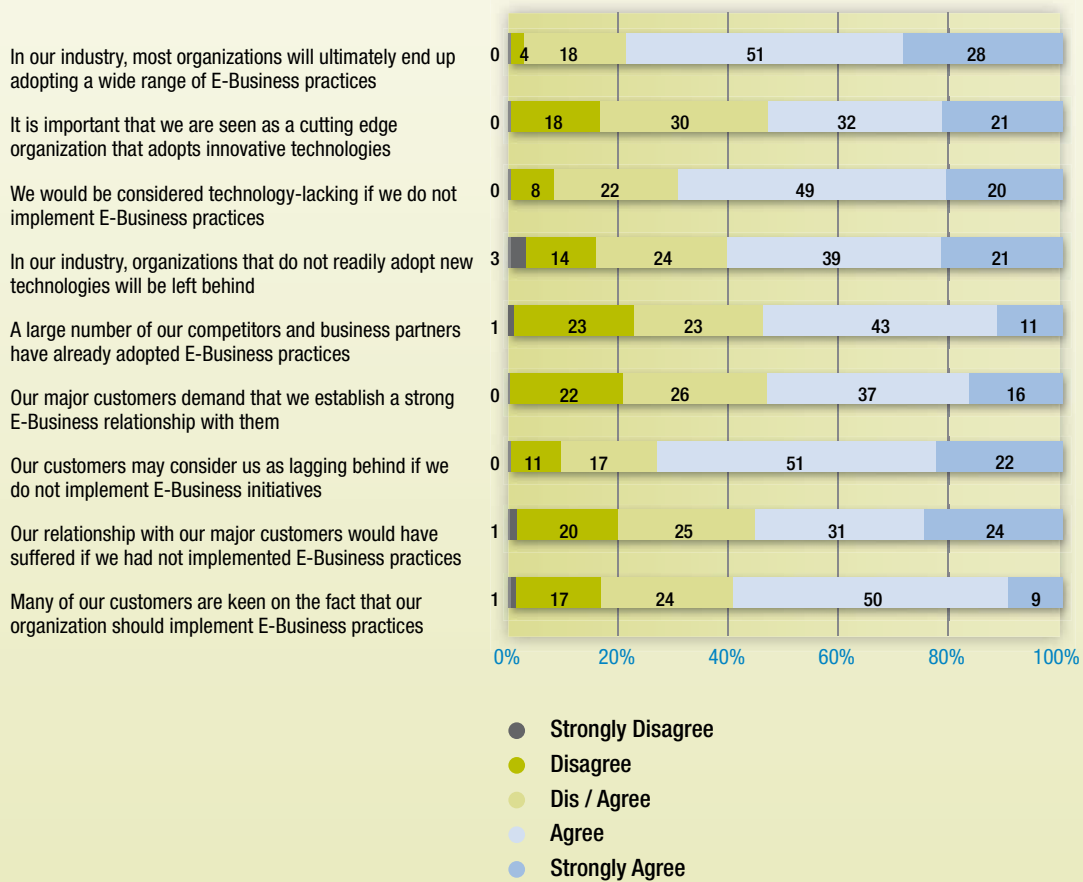


Figure 8: Measuring institutional power

E-Business organizations led by external pressures are often inefficient



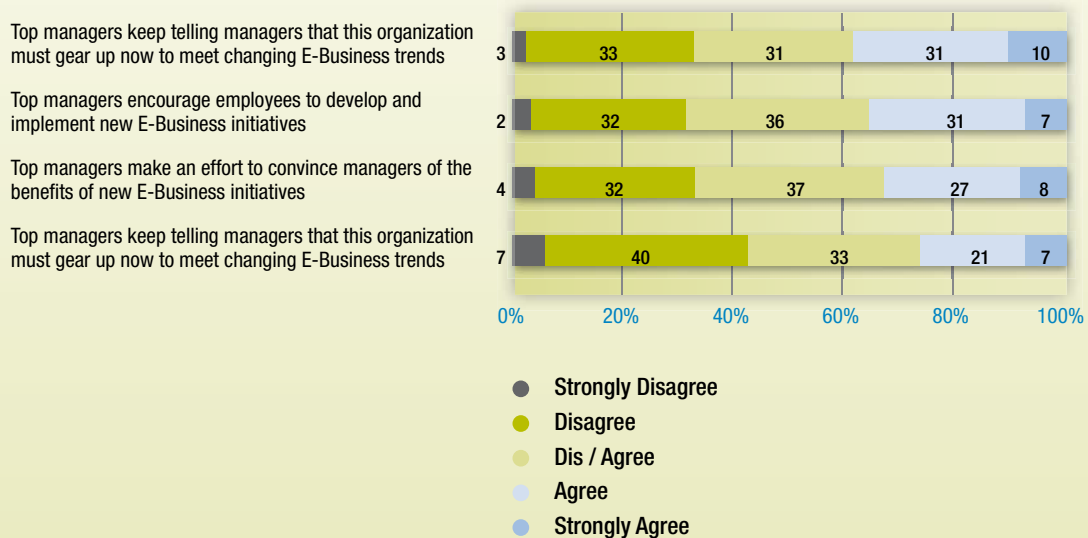
Organizations have the tendency to engage in E-Business because competitors do. This generally ensures the needed management, process structures and IT, but often lacks an intrinsic E-Business culture. This implies that organizations which implement E-Business just to keep up with market changes, do not automatically embrace E-Business innovations within their culture. In this case more management attention, and more intensive training is necessary in order to create an E-Business culture.

Key findings:

- > External focus drives E-Business maturity but does not automatically create the necessary internal culture to embrace innovations
- > Balance E-Business maturity by paying special attention to Culture, Communications and Competencies

Figure 9: Measuring the top management's encouragement of E-Business

Management commitment drives E-Business maturity



Top management emphasis to stimulate E-Business initiatives has an important positive influence on E-Business maturity of all organizational categories. The management board is important to create enough power in the organization to implement and institutionalize sufficient resources in management, people and IT and is able to motivate employees to engage in E-Business pro-actively.

Key findings:

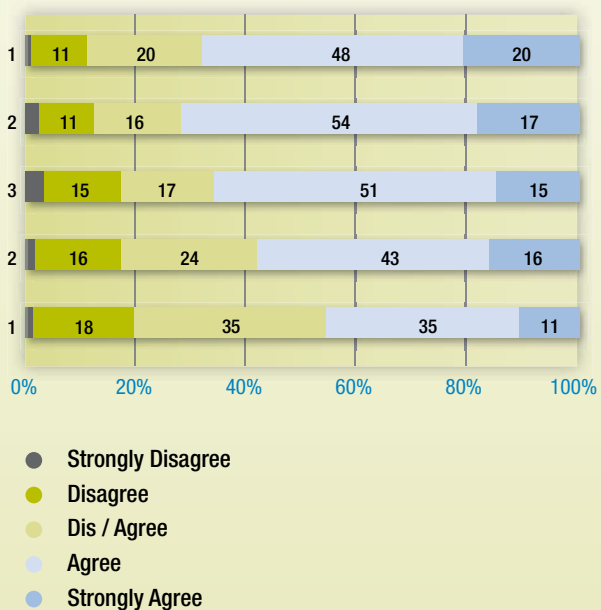
- > Encouragement of top management is a prerequisite for alignment
- > Senior management needs to step up and take ownership of E-Business

Figure 10: Measuring customer orientation

Customer Orientation is important for embracing E-Business culture

Are Dutch organizations customer orientated?

- 1 We measure customer satisfaction systematically and frequently
- 2 Our business strategies are driven by our beliefs about how we can create greater value for our customers
- 3 Our strategy for competitive advantage is based on our understanding of customers' needs
- 2 We constantly monitor our level of commitment and orientation towards serving customers' needs
- 1 Our business objectives are driven primarily by customer satisfaction



Organizations which have a strong customer orientation generally are able to embrace and understand the value of E-Business better. Customer orientation means that the organization is able to understand the wishes of its customers, by measuring customer satisfaction and monitoring market trends and acting accordingly. It places high priority on finding new ways to deliver superior customer value. Employees are more used to think in terms of customer centricity, which can be achieved using the online channel.

However customer orientation is important for organizations as this enables intrinsic adoption of innovations,

finding the right people and mindset of employees is found to be challenging. In this case, making more use of training programs with respect to customer orientation and E-Business should be a valuable asset in order to mature an organization's culture. It can also be supported using (e)CRM tools to increase customer knowledge and the performance of E-Business utilization.

Key findings:

- > **Customer focused culture is a key asset in driving E-Business maturity. The lack of it may imply that E-Business initiatives need to be the driver for an increase in customer orientation**

Although there are more drivers/inhibitors which can be relevant for individual organizations, these have not proved to be a determining factor for E-Business maturity during our Benchmark research.

Recommendation: When performing an internal/external analysis, always include all possible drivers and inhibitors

Figure 11a: Competitor Orientation

We target customer segments where we have an opportunity for competitive advantage

We rapidly respond to actions by competitors that threaten us

Our managers regularly share information regarding competitors' strategies

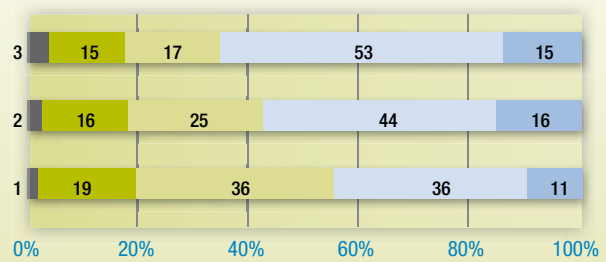


Figure 11b: Future Orientation

The organization is oriented more towards the future than the present

We are slow to detect fundamental shifts in our industry (e.g. competition, technology, regulation)

Market research efforts in the organization are aimed at obtaining information about customers future needs, relative to their current needs

The organization places more emphasis on future customers relative to current customers

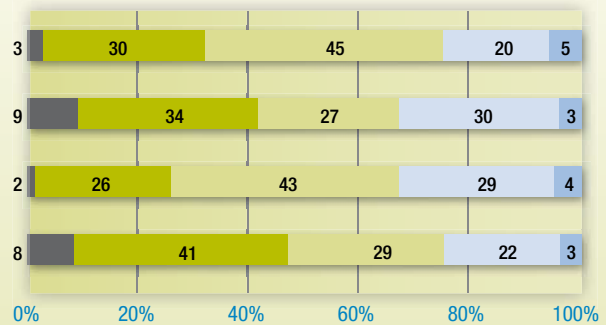


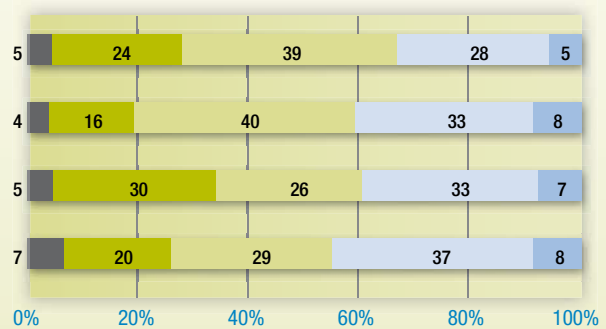
Figure 11c: Innovativeness

At the cutting edge of technological innovation

Entrant in mature, stable markets

Later entrant in established butt still growing markets

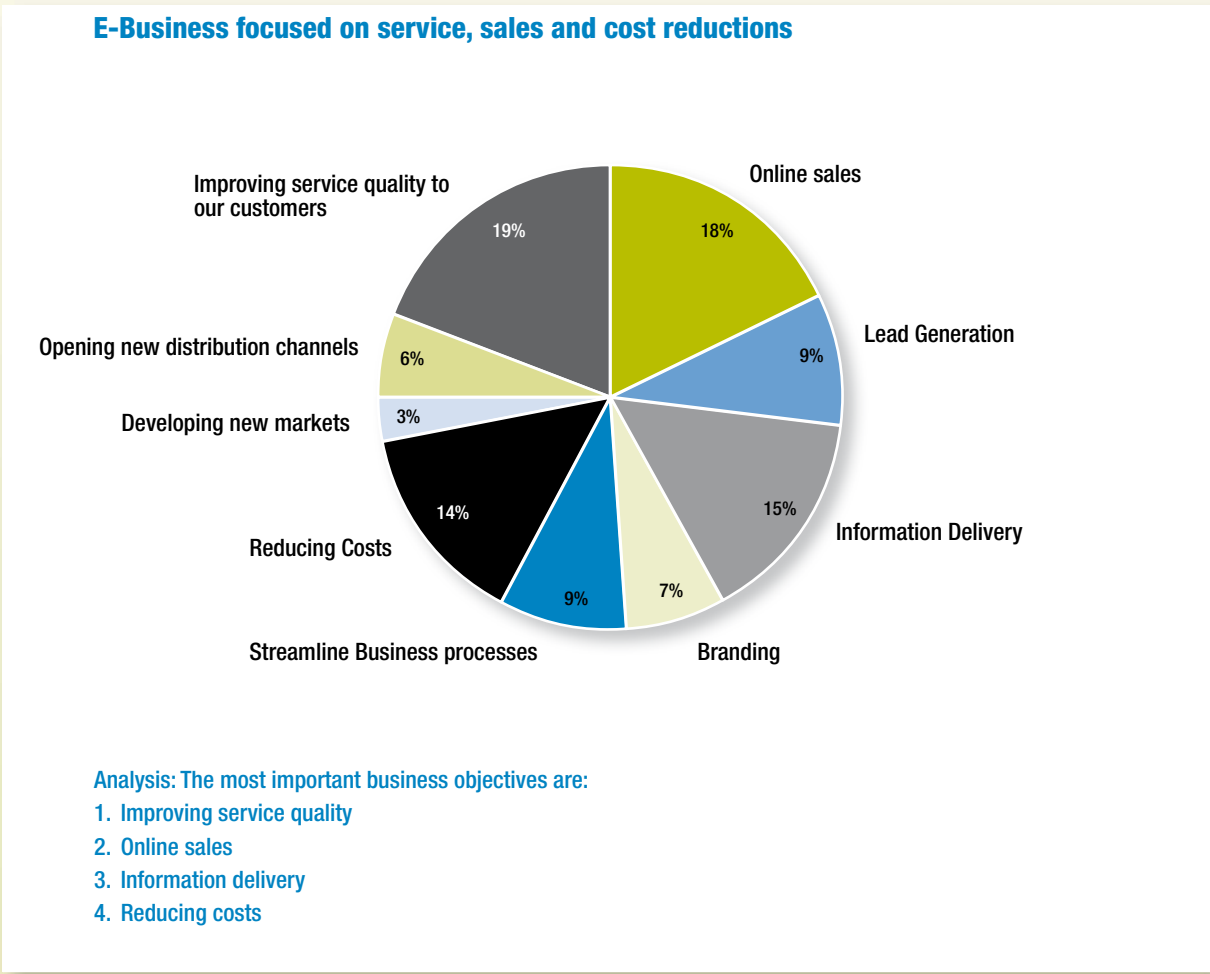
First to market with innovative new products and services



- Strongly Disagree
- Disagree
- Dis / Agree
- Agree
- Strongly Agree

E-BUSINESS OBJECTIVES, IMPORTANCE, ORGANIZATION

Figure 12: Service, sales and cost reductions are the primary objectives for E-Business



Remarkable: E-Business limited in supporting the development of new markets and distribution channels

Remarkable: Mobile marketing is not on the agenda for 2009

E-BUSINESS OBJECTIVES EVENLY DIVIDED BETWEEN GETTING NEW CUSTOMERS AND KEEPING EXISTING ONES

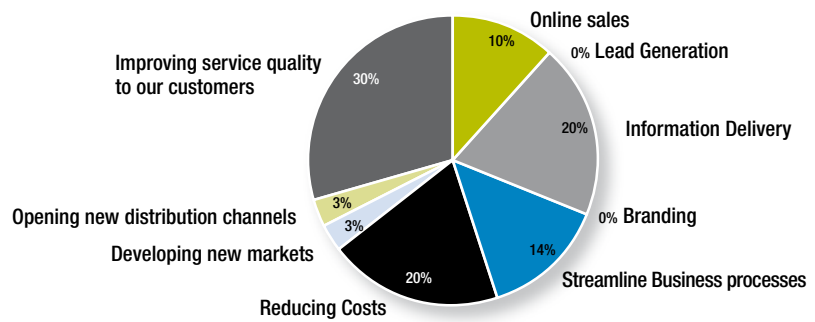
The main objective of E-Business is the improvement of service quality to existing customers (19%). In close second place is the focus on online sales (18%). These two objectives apparently are at odds with each other, as the one is geared towards keeping customers and the other towards getting new customers. Information delivery and cost reductions are following in close quarters.

Figure 13: Differences in business objectives for E-Business between sectors

Sector determines focus of E-Business initiatives

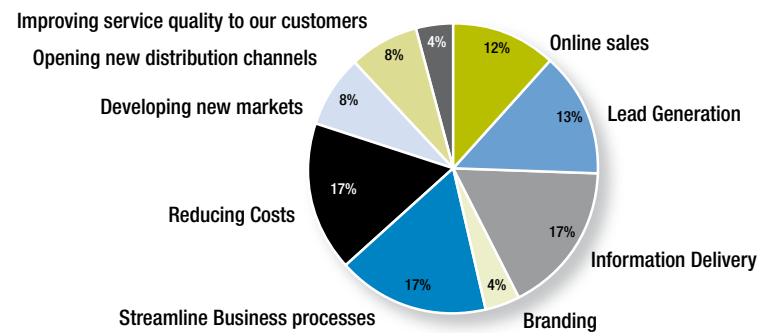
Government & Education

Analysis: focus on reducing costs, information delivery and improving service quality



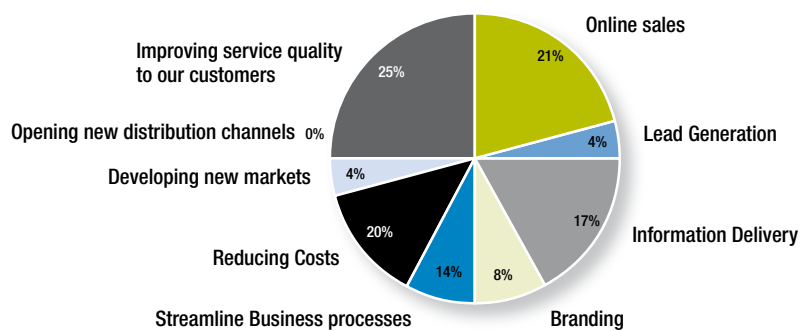
Professional services

Analysis: focus on streamlining business processes and reducing costs



Utilities

Analysis: focus on online sales and service quality



Retail

Analysis: focus on online sales (at the expense of service)

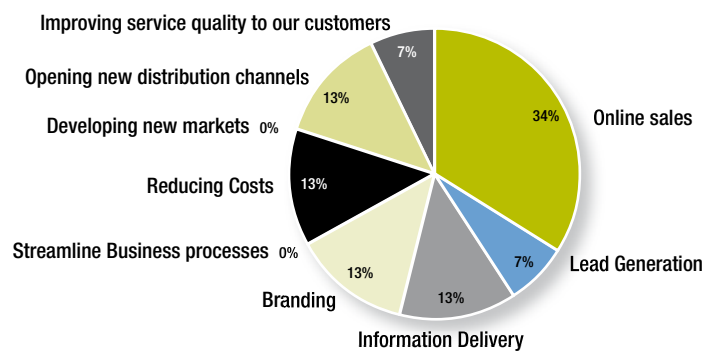


Table 2: The most important business objectives per sector

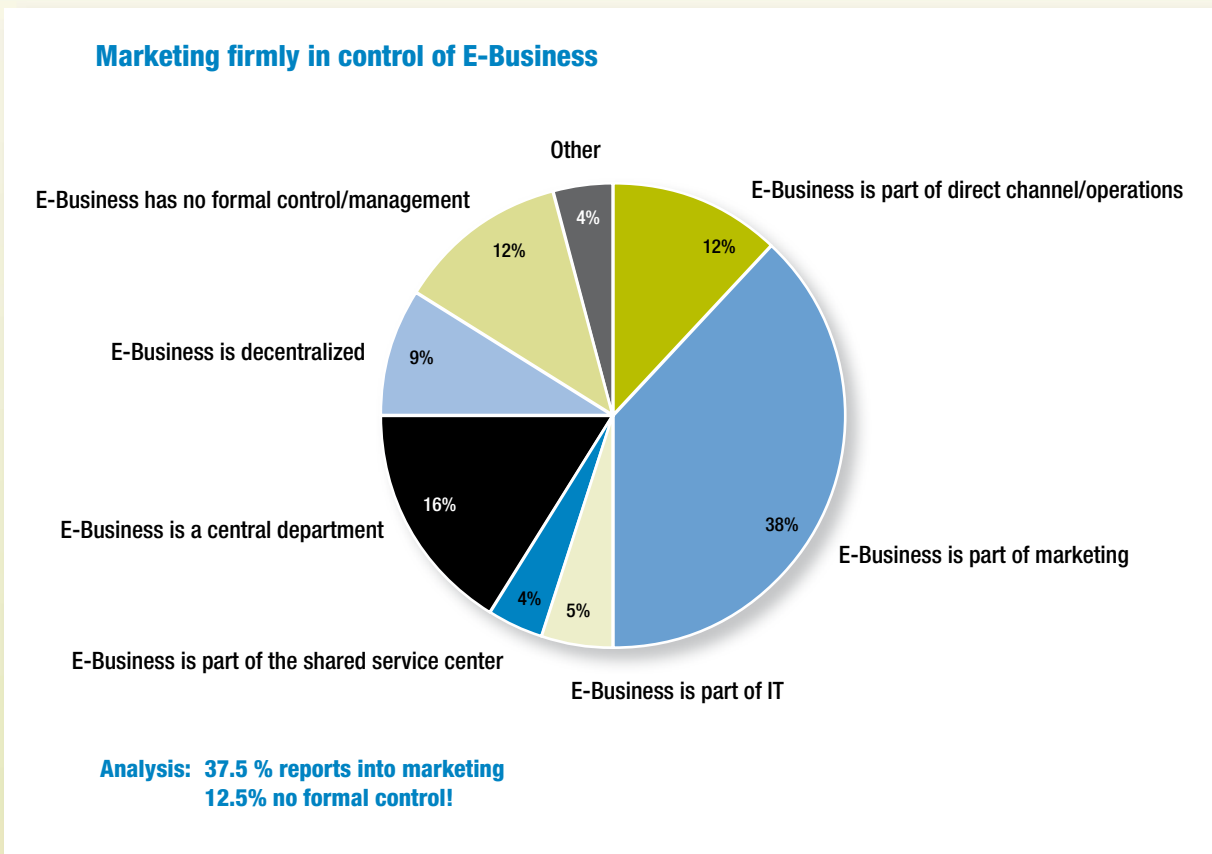
Improving service quality least important in Retail and Professional Services

BUSINESS OBJECTIVES	SECTOR										
	Overall %	Government	Financial Services	Telecom & Media	Utilities	Retail	Professional Services	Pharma + Chemical	High Tech & Electronics	Automotive & Transport	Other
Online sales	18	10	22	24	20	33	13	13	14	19	20
Lead Generation	8	0	10	5	4	7	13	4	19	7	0
Information Delivery	15	20	12	13	17	13	17	20	14	11	13
Branding	7	0	4	5	8	13	4	18	7	7	7
Streamline Business processes	9	14	10	3	8	0	17	9	11	7	13
Reducing Costs	14	20	14	11	13	13	17	16	11	19	13
Developing new markets	3	3	3	11	4	0	8	2	0	0	0
Opening new distribution channels	6	3	7	13	0	13	8	0	4	4	7
Improving service quality to our customers	19	30	17	16	25	7	4	18	21	26	27
Total (%)	100	100	100	100	100	100	100	100	100	100	100

Not surprisingly, sectors focusing most on Online sales are Retail and Telecom & Media, while Government, Automotive and Utilities are focusing most on Improving

their service quality to customers. Opening new distribution channels and developing new markets have the least priority overall.

Figure 14: Please enter the location which best describes the main location for control/management of E-Business in your organization



Although most organizations (37.5%) have E-Business reporting in their marketing department, the location of E-Business in the organization varies strongly. Only 5.4% of respondents indicated that E-Business is controlled by IT. This move away from IT is a logical step in E-Business maturity and supported by the general maturity level established in this research.

Most striking is that an alarming 12.5% still has no formal control for E-Business assigned.

Recommendation: formalize E-Business governance, roles & responsibilities

Table 3: Differences in objectives determined by functional department E-Business is reporting to

Functional location influences E-Business objectives

BUSINESS OBJECTIVES	FORMAL CONTROL OF E-BUSINESS							
	Overall %	E-Business is part of IT	E-Business is part of Marketing	Shared Service Centre	Direct Channel	Decentral	Central	No Control / management
Online sales	18	20	13	0	28	19	22	10
Lead Generation	8	10	15	0	3	0	4	18
Information Delivery	15	25	15	13	13	11	7	20
Branding	7	5	7	0	10	4	6	5
Streamline Business processes	9	0	10	27	8	11	15	7
Reducing Costs	14	15	13	27	10	19	15	12
Developing new markets	3	5	6	7	5	7	2	0
Opening new distribution channels	6	5	6	0	8	7	6	5
Improving service quality to our customers	19	15	15	27	15	22	24	23
Total (%)	100	100	100	100	100	100	100	100

Improving service quality is the primary E-Business objective for organizations. However, there are some significant differences, dependent on the functional location:

- > When E-Business is part of IT: E-Business objectives are focused on information delivery, online sales and cost reductions

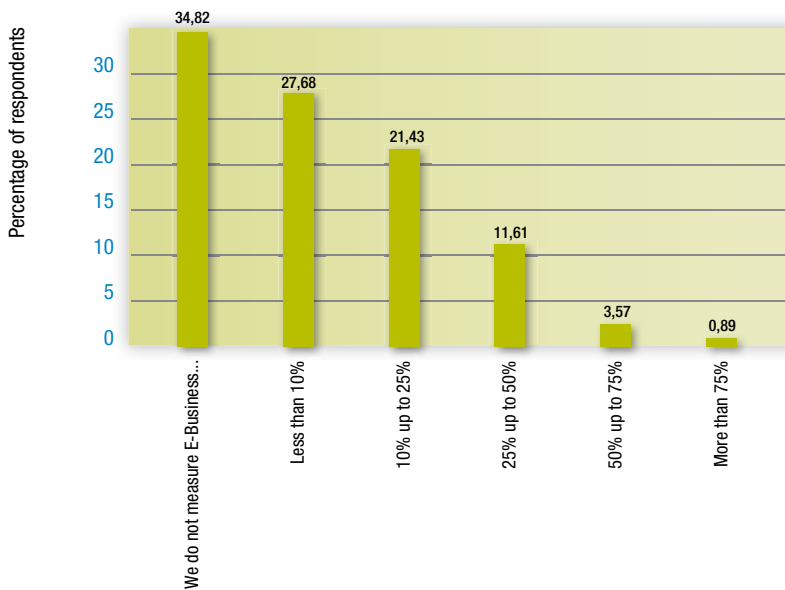
- > When E-Business is part of a shared service centre: E-Business is primarily focused on efficiency improvements: reducing costs and streamlining business processes

- > When E-Business has no formal control: E-Business objectives are focused on information delivery and lead generation

Figure 15: Please indicate the contribution to your organization's gross turnover generated by E-Business

Measuring E-Business contribution is still not common practice

E-Business contribution to gross turnover is more limited than expected



Analysis: Only 16% of organizations see E-Business contribute more than 25% to turnover
 35% of the participating organizations do not measure E-Business contributions
 E-Business struggles to add value when it has no formal control

Recommendation: analyze strategic business objectives and organizational location to see if they fit

Recommendation: Invest in measuring E-Business contribution to total turnover, especially in the current economic climate

Recommendation: Start measuring cross-channel contribution of E-Business to determine the real value for the organization

A staggering 35 % of the participating organizations do not measure the contribution of E-Business to overall turnover at all. In general, these companies see E-Business

add significantly less to turnover than companies which do measure.

One of the key challenges for the participating organizations remains to demonstrate the added value of E-Business to the overall organization. Unsurprisingly, there is a strong relationship between demonstrating and measuring E-Business contribution and the allocation of its budgets.

Companies benefit from measuring E-Business performance, setting the right KPIs and using E-Business balanced scorecards. This enables them to identify the drivers of E-Business performance and manage the channel accordingly.

Table 4: Financial services and Telecom & Media lead the way in E-Business contribution

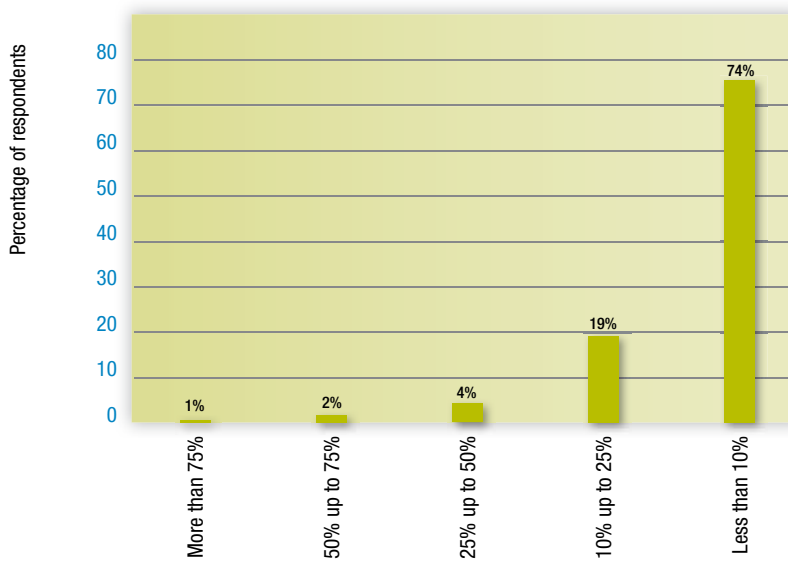
SECTOR	CONTRIBUTION TO E-BUSINESS						Total number
	We do not measure	Less than 10%	10% up to 25%	25% up to 50%	50% up to 75%	More than 75%	
Automotive	22%	44%	33%	0%	0%	0%	9
Financial Services	24%	10%	38%	24%	0%	45%	21
Government & Education	50%	10%	30%	10%	0%	0%	10
High Tech & Electronics	37%	42%	5%	16%	0%	0%	19
Pharma & Chemicals	60%	20%	20%	0%	0%	0%	15
Professional Services	38%	13%	38%	0%	13%	0%	8
Retail	20%	60%	0%	20%	0%	0%	5
Telecom & Media	33%	33%	8%	17%	8%	0%	12
Utilities	25%	50%	25%	0%	0%	0%	8
Other	20%	20%	0%	20%	40%	0%	5
Total number	39	31	24	13	4	1	112

While Financial Services, Telecom & Media and Retail are leading the way in E-Business contribution to turnover, Pharma & Chemicals, and Utilities are trailing. Pharma & Chemicals is the sector where E-Business contribution is least measured. Even with the sector

focusing on information delivery, branding and customer service, performance measurement clarifies the role E-Business can play and move E-Business initiatives forward.

Figure 16: Please estimate E-Business budget as a % of total turnover

Acquiring sufficient budgets remains a main concern



Analysis: 74 % of respondents have less than 10% budget for E-Business activities

Recommendation: Intensify cooperation with other projects/departments to co-fund projects

E-Business managers are still struggling to acquire sufficient budgets. 74 % of the respondents state that their organization has less than 10 % of total turnover allocated to E-Business. Also respondents indicate that

acquiring sufficient budgets remains one of their main challenges for the upcoming 12 months. The economic downturn is adding additional pressures to this. The task for E-Business managers is to prove the added value of E-Business during times of recession in order to secure their budgets and projects.

Table 5: Number of E-Business employees for different governance structures

Decentralized and direct channel organizations have the largest E-Business teams

NUMBER OF E-BUSINESS EMPLOYEES

FORMAL CONTROL OF E-BUSINESS

NUMBER OF E-BUSINESS EMPLOYEES	FORMAL CONTROL OF E-BUSINESS					
	E-Business has no formal control/ management	E-Business is a central department	E-Business is decentralized	E-Business is part of direct channel/ operations	E-Business is part of IT	Marketing
1-10	71,43	38,89	30,00	23,08	66,67	57,14
11-50	21,43	27,78	20,00	46,15	16,67	35,71
50-100	0,00	5,56	10,00	7,69	16,67	2,38
100-300	7,14	27,78	10,00	7,69	0,00	4,76
>300	0,00	0,00	30,00	15,38	0,00	0,00
total	100	100	100	100	100	100

**Analysis: The majority (78,57%) of all organizations have up to 50 specific E-Business employees
Decentralized and direct channel organizations have the largest E-Business teams**

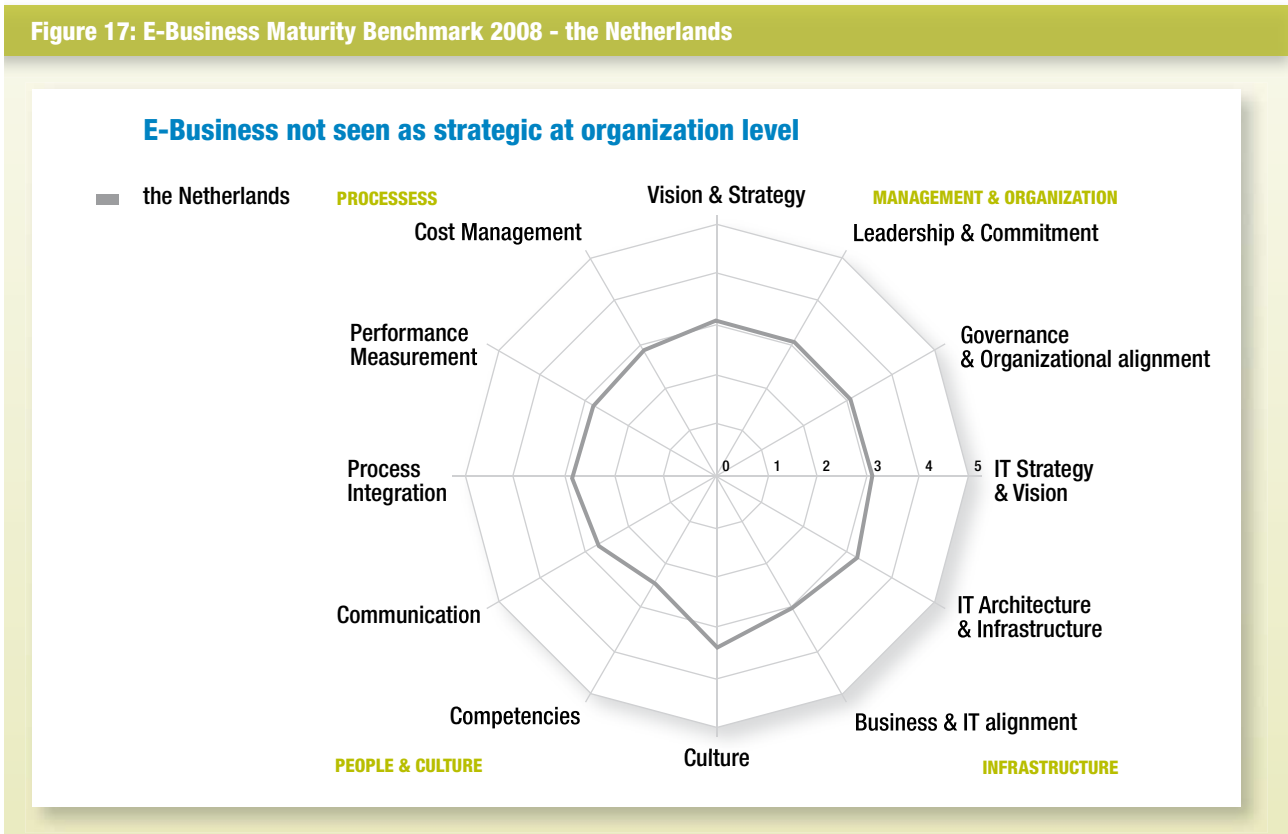
Recommendation: for decentralized E-Business organizations: examine governance, competencies and procedures to be as efficient as possible with available staff

E-Business managers often have to cope with key questions such as: ‘How large should our E-Business

team be?’ ‘How many people do we need in order to maximize performance?’ Answering this question, or being able to benchmark it, may be the holy grail for many organizations. The findings of this research show that large organizations, using a decentralized model, usually have a large number of E-Business team members.

E-BUSINESS BENCHMARK 2008

Figure 17: E-Business Maturity Benchmark 2008 - the Netherlands



Organizations do not unlock their E-Business potential!

Even though organizations often think they are doing well with respect to E-Business, our benchmark shows differently. E-Business maturity is situated at a departmental level, meaning that the formal control is in place in a subsidiary department or a central E-Business department. E-Business is still not an integral part of the business, but only from a single department. The vision and strategy for E-Business are only formulated at a departmental level. Therefore E-Business does not work cross departments.

In this situation E-Business risks being in a functional silo without sufficient support in the organization, this leads to clear-cut inefficiency and insufficient utilization of the E-Business potential.

On the bright side, on average Dutch organizations are evenly mature over the different dimensions; therefore they are well developed in their maturity stage. However, some discrepancies are shown on the dimensions of

Culture & Competencies in the People & Culture category. Culture is more mature than other dimensions of the clover leaf. This suggests that employees generally see more added value in E-Business than the organization utilizes. Also increased by the low level of E-Business competencies it is indicated that employees are struggling with a lack of competencies and 'know how' to benefit from and unlock the E-Business potential.

Key findings:

- > Strategic value of E-Business not yet seen at organizational level
- > Potential of E-Business is not utilized across departments
- > Lack of competencies are a main barrier to successfully realizing E-Business potential

Fast forward:

- > Leverage the positive culture towards E-Business
- > Invest more in developing in house E-Business competencies (cross departments)
- > Communicate successful projects of E-Business as showcases to exchange knowledge

E-BUSINESS MATURITY MOST INFLUENCED BY INDUSTRY, MANAGEMENT COMMITMENT AND CUSTOMER ORIENTATION

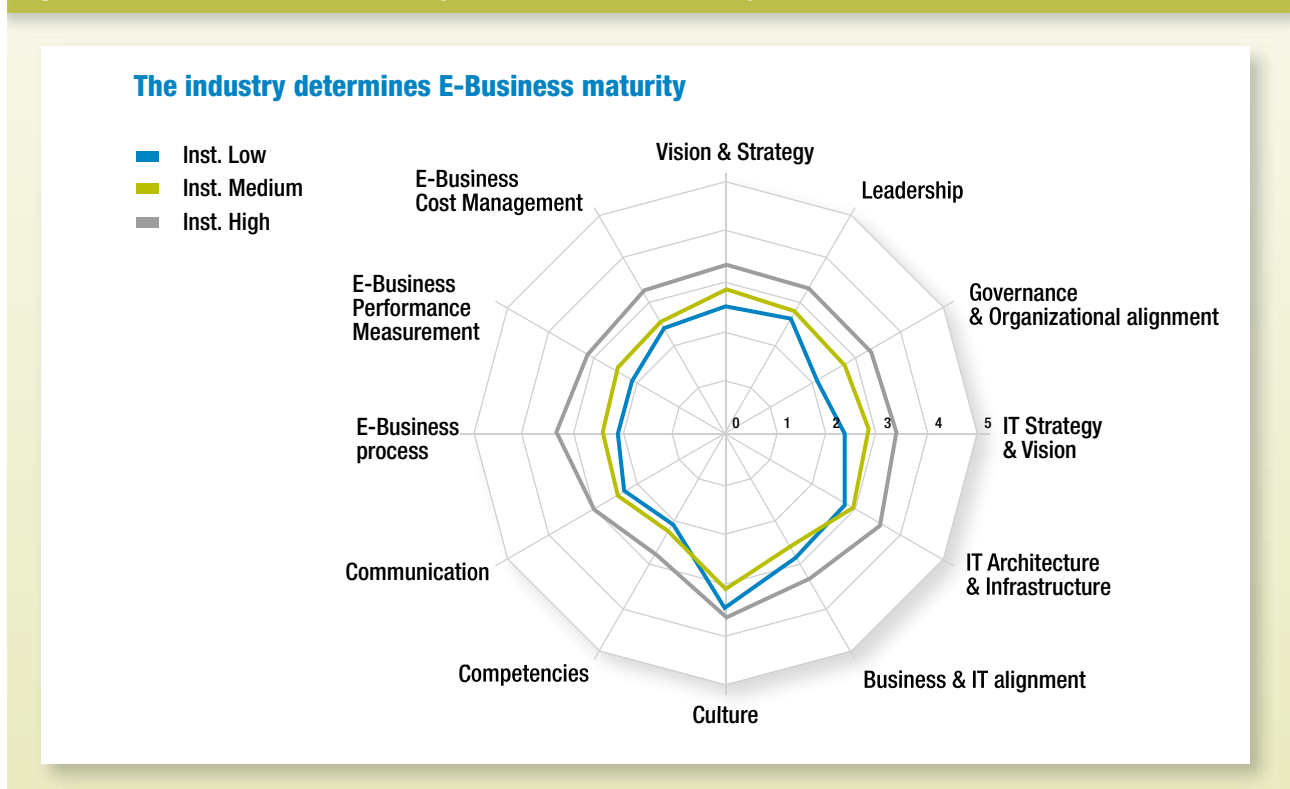
As mentioned earlier, of the seven drivers and inhibitors for E-Business maturity, three have been identified to make a significant difference in E-Business maturity. These are:

1. Institutional powers
2. Management emphasis
3. Customer orientation

When organizations perceive these indicators are high, they are a significant driver for E-Business maturity. When organizations indicate low scores, the indicators are inhibitors for E-Business maturity. In the latter situation they should gain management attention in order to further mature the E-Business organization.

Organizations have the tendency to engage in E-Business because competitors do. This generally ensures the needed management, process structures and IT, but often lacks an intrinsic E-Business culture. This implies

Figure 18: The influence of institutional power on E-Business maturity



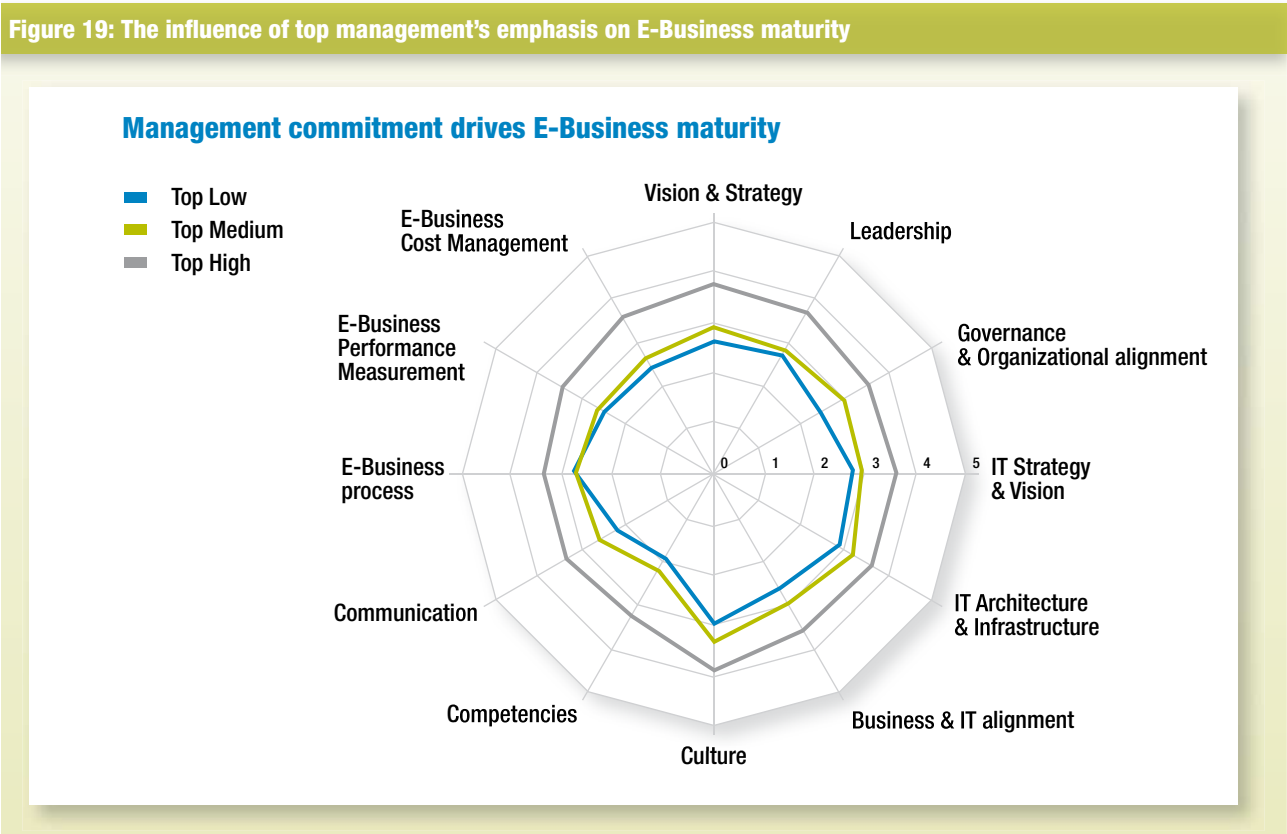
that organizations which implement E-Business, just to keep up with market changes, do not automatically embrace E-Business innovations within their culture.

In this case management should stress its focus on new E-Business innovations towards its employees. Organizations should also take care in institutionalizing E-Business training and knowledge sharing in order to create an E-Business culture as well. Only then, employees will be more innovative with E-Business initiatives and a culture of E-Business will emerge.

Key findings:

- > **Industry determines:** but standards are often set in other sectors. Keep a close eye on your customers and competition. They will drive the demand for E-Business
- > **Carefully choose your benchmarks,** including other customer groups and sectors
- > **Be critical about your organization.** Does your organization engage in E-Business because the organization perceives added value in E-Business? Or because you have to?

Figure 19: The influence of top management's emphasis on E-Business maturity

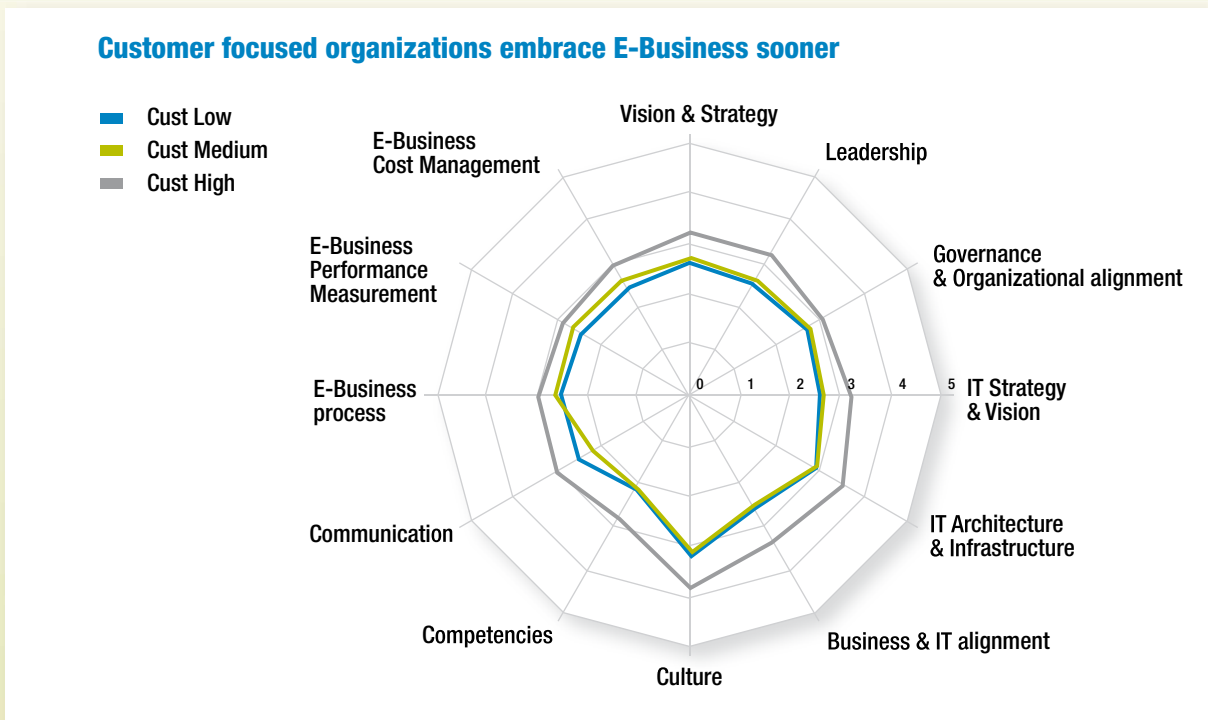


Top management emphasis on stimulating E-Business initiatives has an important positive influence on all categories of E-Business maturity. The management board is important to create enough power in the organization to implement and institutionalize sufficient resources in management, people and IT and is able to motivate employees to engage in E-Business pro-actively.

Key findings:

- > Encouragement of top management is a prerequisite for alignment
- > Senior management needs to take ownership of E-Business

Figure 20: The influence of customer orientation on E-Business maturity



Organizations which have a strong customer orientation generally are able to embrace and understand the value of E-Business better. Customer orientation means that the organization is able to understand the wishes of its customers, by measuring customer satisfaction and monitor market trends and act accordingly. It places a high priority on finding new ways to deliver superior customer value. Employees are more used to thinking in terms of customer centricity, which can be achieved by using the online channel.

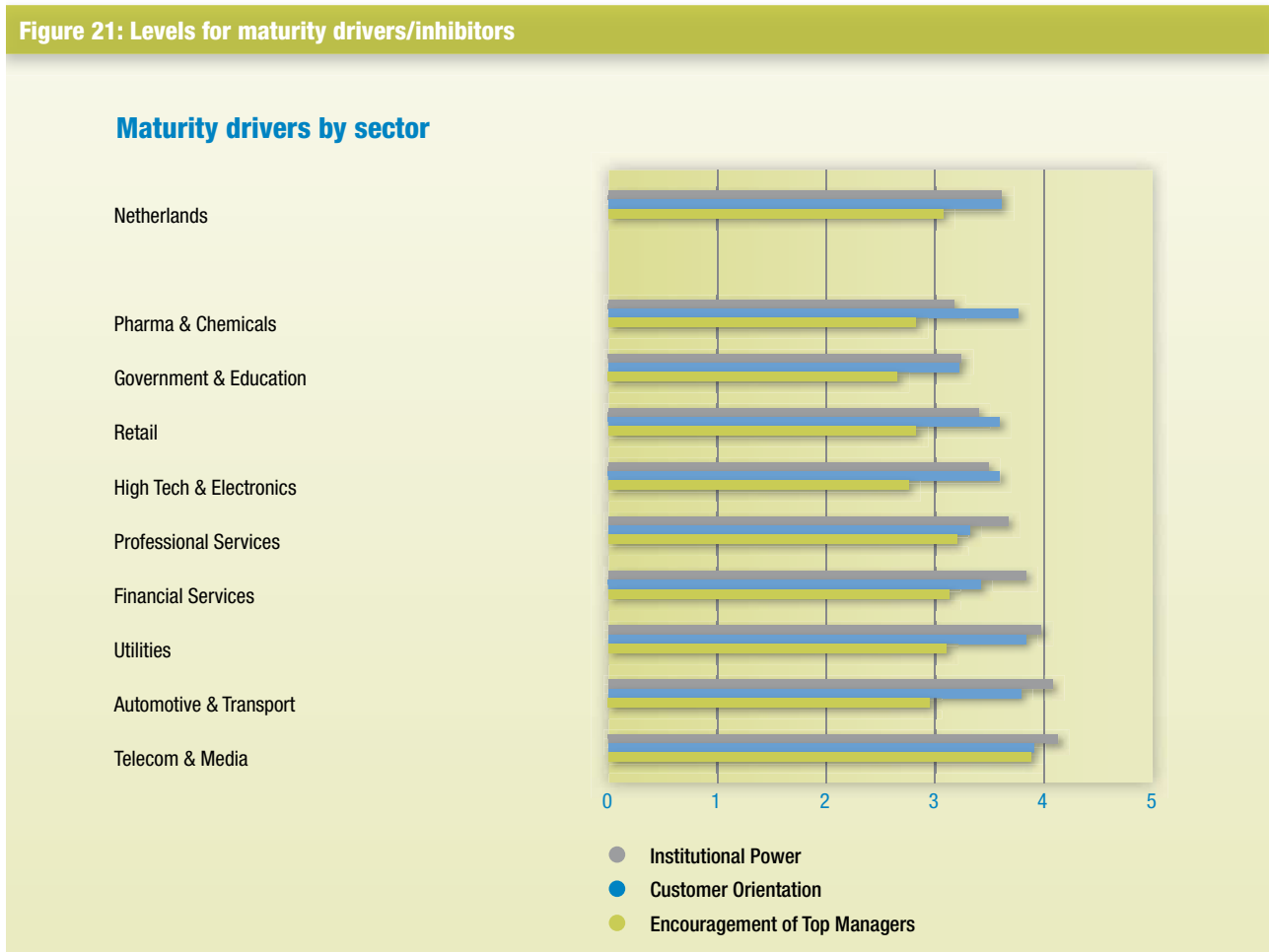
However, customer orientation is important for organizations as this enables intrinsic adoption of innovations, finding the right people and employee mindset is challenging. In this case, making more use of training programs with respect to customer orientation and

E-Business are a valuable asset in order to mature an organization's culture. It can also be supported by using (e)CRM tools, in order increase customer knowledge and the performance of E-Business utilization.

Key findings:

- > Important for embracing E-Business is the organizational culture
- > Know your customer, how demanding are their E-Business wishes
- > Strong customer orientation leads to positive culture towards E-Business
- > Leverage customer focused culture as a building block in maturing your E-Business
- > Recruit employees with strong customer orientation skills

Figure 21: Levels for maturity drivers/inhibitors



Organizations from different sectors provide different scores for each of the drivers and inhibitors differ per sector. Compared to the Dutch average, organizations in the Pharma & Chemicals and Government & Education sectors perceive the least institutional powers. Their industries are the least demanding in terms of E-Business.

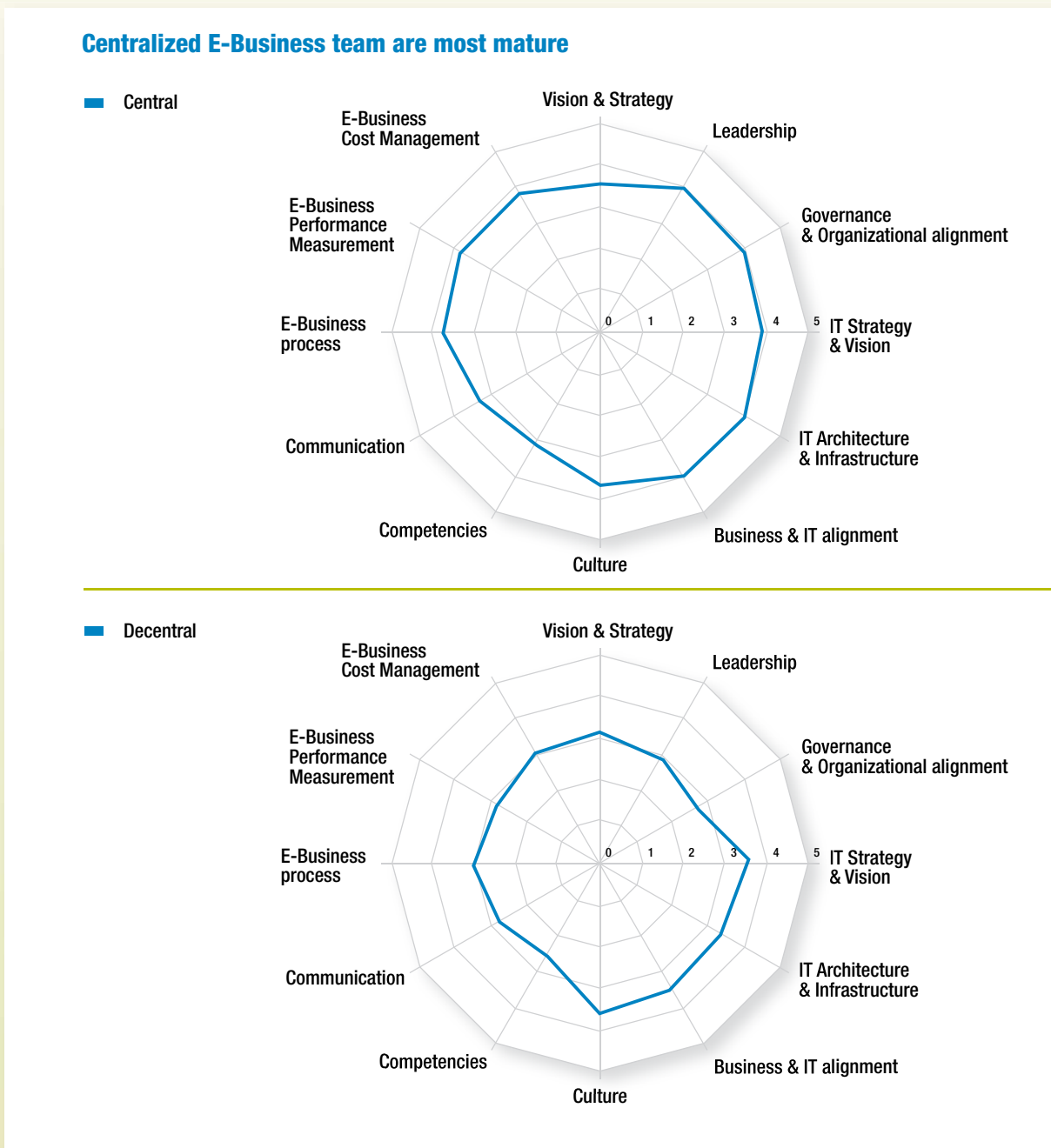
Organizations in Telecom & Media indicate the highest institutional powers, but also Utilities, and Automotive & Transport indicate high scores for this indicator. In these sectors the online environment is competitive.

> **Pharma & Chemicals** scores low for institutional power, but highest for Customer Orientation. Recommendation: keep a clear eye on market developments as benchmarks are often created outside your own sector

- > **Government & Education** scores the lowest Customer Orientation and may benefit from a more customer centric approach
- > **Professional Services** indicates having low customer orientation. Earlier we have also shown that this sector generally uses E-Business for reducing cost and streamlining business processes. Both analyses indicate that this sector may benefit from becoming more customer oriented, and less focused on the internal organization like budgets and processes.
- > **Telecom & Media** benefits from top management involvement
- > **Several sectors** often lack top management encouragement, in their case this lack of encouragement is an inhibitor for maturing E-Business

Remarkable: Encouragement by top management is strongest in Telecom & Media

Figure 22: The maturity benchmarks for a centralized and decentralized E-Business department

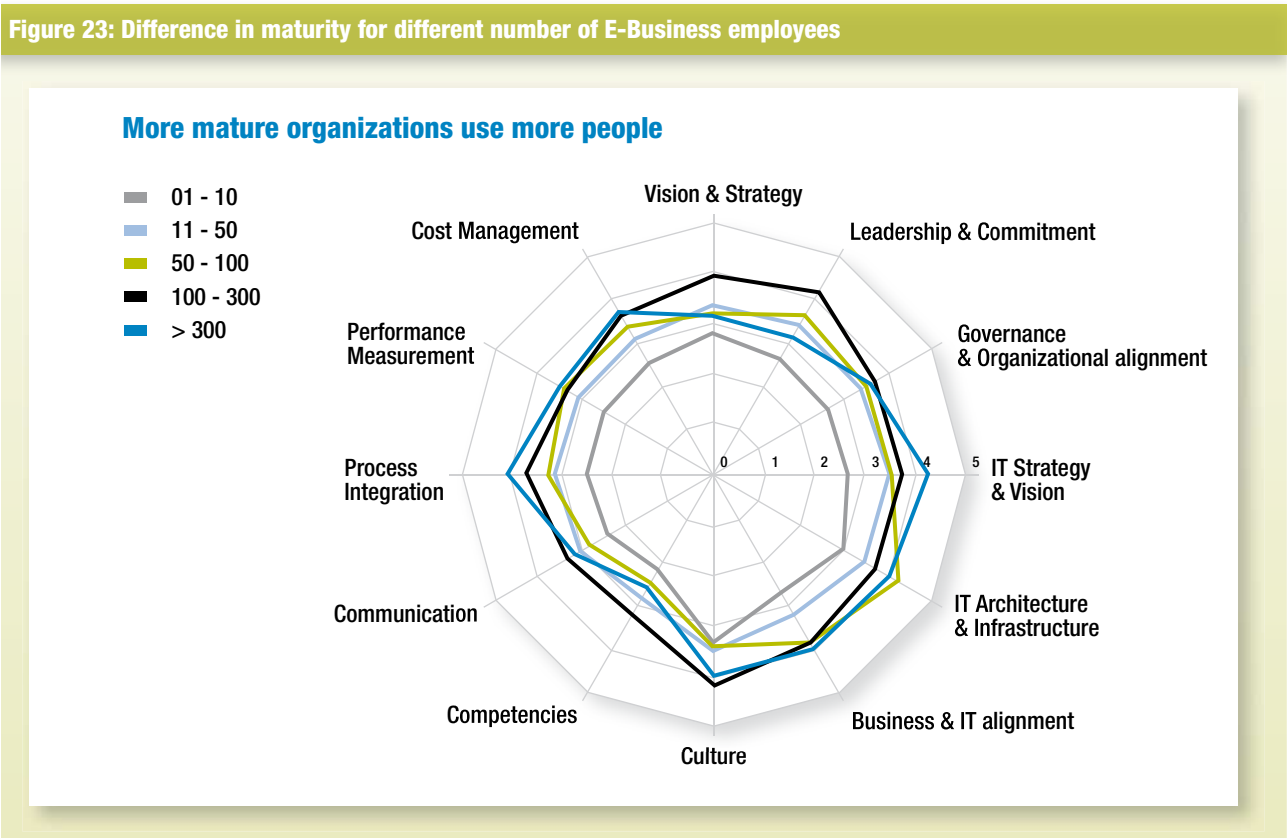


Decentralized E-Business struggles with leadership, governance and competencies

Organizations with centralized E-Business teams score highest on E-Business maturity. This is in line with stage

four of the E-Business Maturity Model, the managed stage. Decentralized teams are struggling with leadership and governance, most likely due to their dispersed position in the organization.

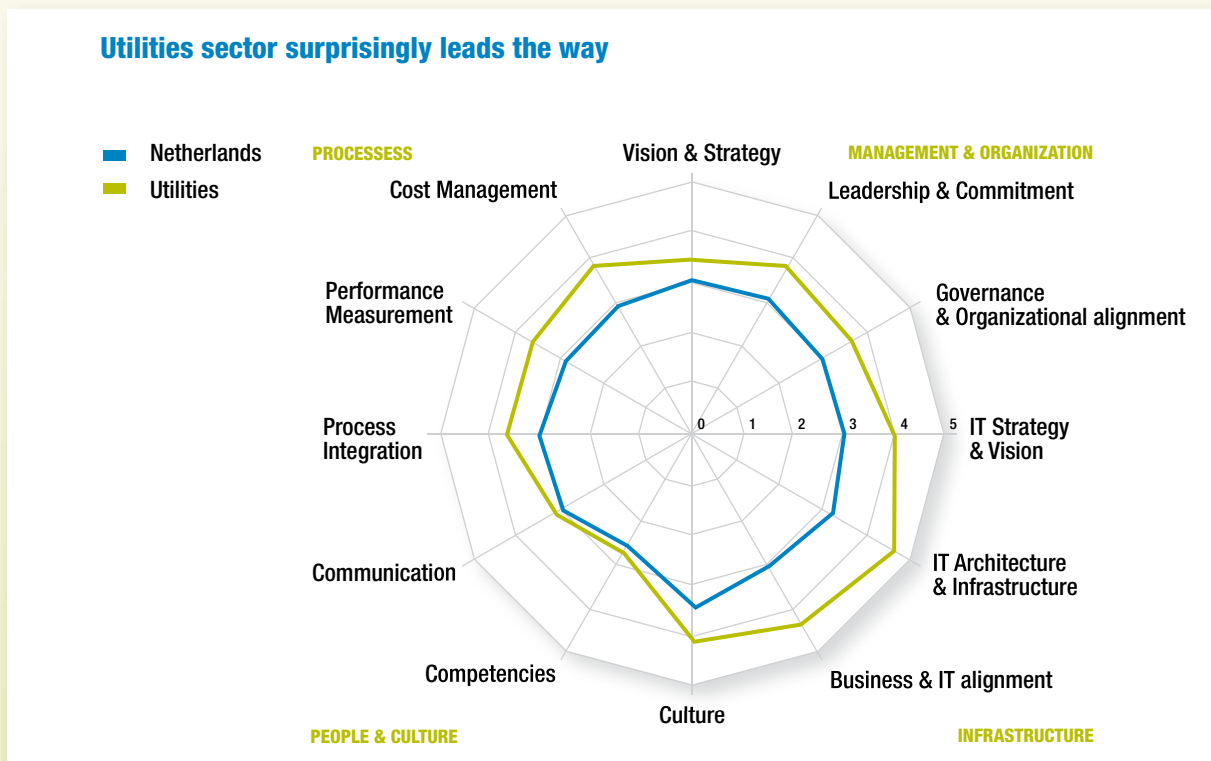
Figure 23: Difference in maturity for different number of E-Business employees



More mature organizations make use of larger E-Business teams

Larger organizations also score higher in maturity on the Infrastructure elements of the E-Business Maturity Model. However, really large organizations (>300) seem to face challenges of their own as they are trailing in Vision & Strategy, Leadership & Commitment and E-Business Competencies.

Figure 24: Industry benchmark of the Utilities sector



KEY FINDINGS FROM 10 BENCHMARKED SECTORS: UTILITIES LEADS THE WAY WHILE GOVERNMENT IS TRAILING

During the benchmark we identified 10 relevant sectors, these show differences in E-Business maturity. Interestingly the specific sector benchmarks show more inconsistencies for the several sectors.

The Utilities sector is most mature, nearing maturity stage 4. This indicates that E-Business is integrated across the whole organization. However the People & Culture category shows a significant disjoint. Especially competencies and communications are underdeveloped compared to their sector’s overall maturity level. Also noteworthy is the fact that the ICT & Infrastructure

dimension is most mature, possibly due to the forced changes in this sector.

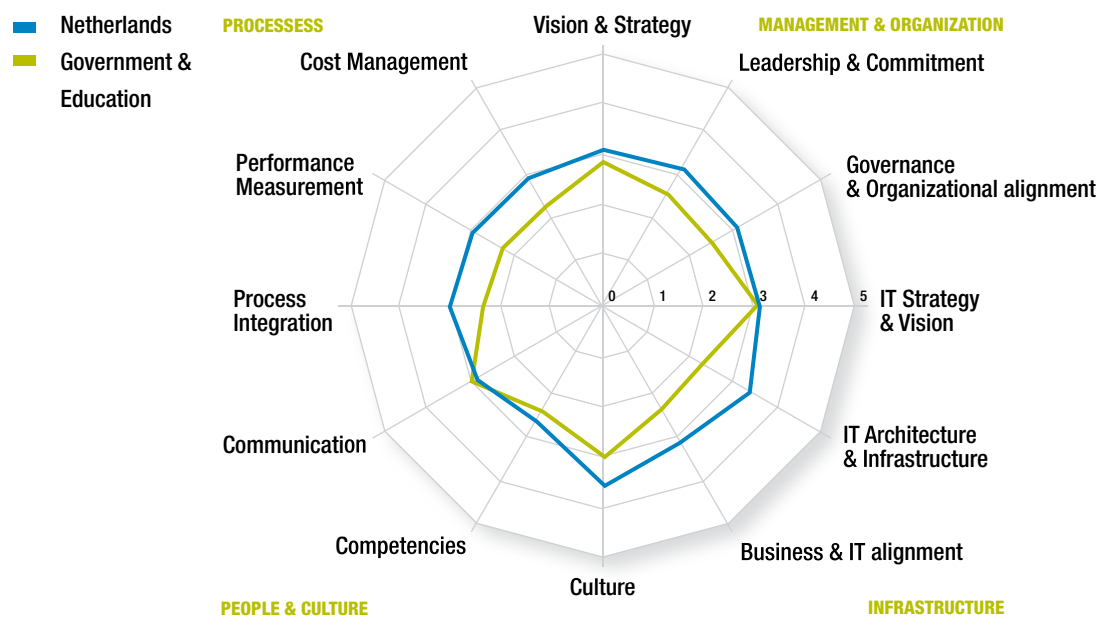
The discrepancy between the most and least mature dimension is large (three stages).

Fast Forward:

- > Invest in establishing a compelling Vision & Strategy for E-Business across the organization. Risk of E-Business not getting enough attention due to required organizational restructuring projects
- > Improve communication across the organization, focusing on E-Business success, value for the customers and the entire organization
- > Enhance E-Business competences by setting up cross-functional E-Business training, include E-Business targets in personal development plans

Figure 25: Industry benchmark of the Government & Education sector

Government & Education trails as they face challenges in delivering the promise of online government

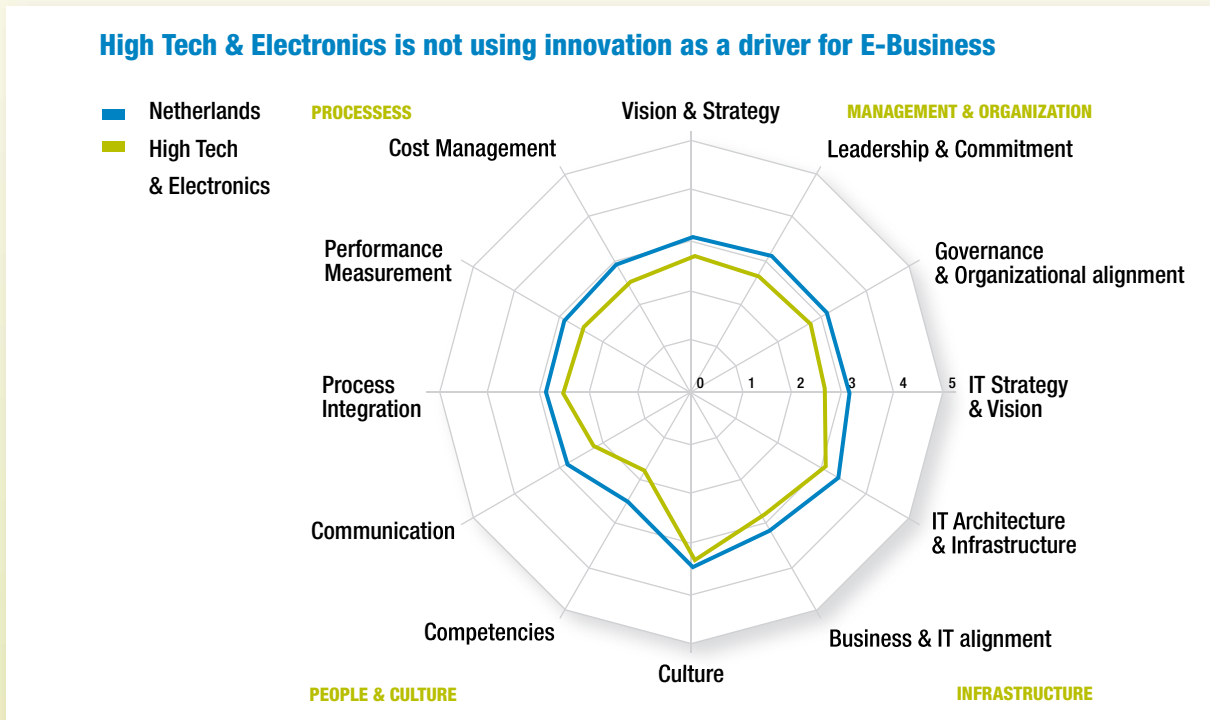


Government & Education is the least mature sector. Keeping in mind the government's clear goals on e-services for citizens, there are many challenges. The main challenge to improve E-Business maturity is strengthening the Vision & Strategy (how can we translate the central goals to our organization/department). Based on this, Leadership & Governance can be clarified.

Fast Forward:

- > **Vision & Strategy scores relatively low:** Analysis: government sector encounters difficulties translating national legislation to organizational level. Recommendation: Clarify impact on own organization and set up roadmap accordingly
- > **Clarify Governance and Leadership** and set goals for Process Integration and Performance management to gain control over initiatives
- > **Contemplate innovative initiatives** outside current IT Infrastructure to build Competencies and Culture and show results

Figure 26: Industry benchmark of the High Tech & Electronics sector

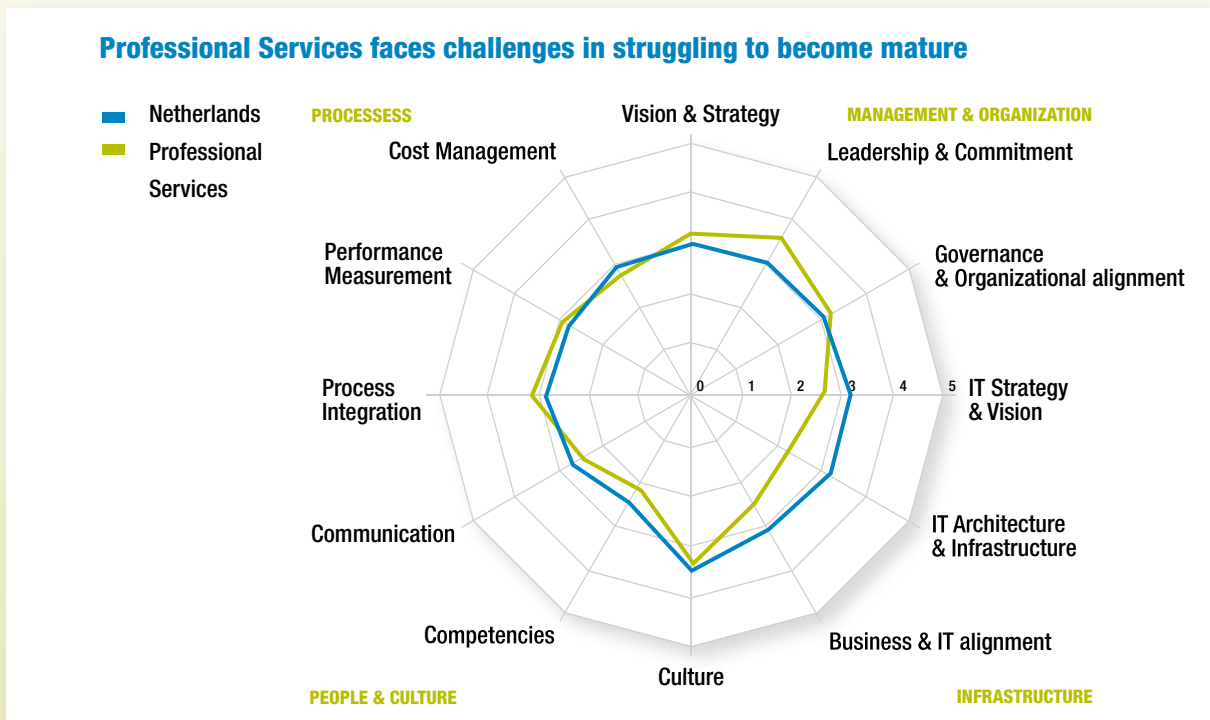


High Tech & Electronics is less mature than the benchmark average, which is surprising due to the nature of the products and level of innovation in the sector. Innovation is not seen as a driver for E-Business initiatives. For business-to-business companies, a persisting argument against E-Business is the complexity and/or price of the products. This proves to be a key inhibitor, leading to an underestimation of the value of the online channel for the organization at strategic level.

Fast Forward:

- > Investigate the value of E-Business at strategic level for the organization and set actions accordingly. Because of the relative immaturity, E-Business can still be used as a differentiator
- > Improve internal communication and competencies development

Figure 27: Industry benchmark of the Professional Services sector

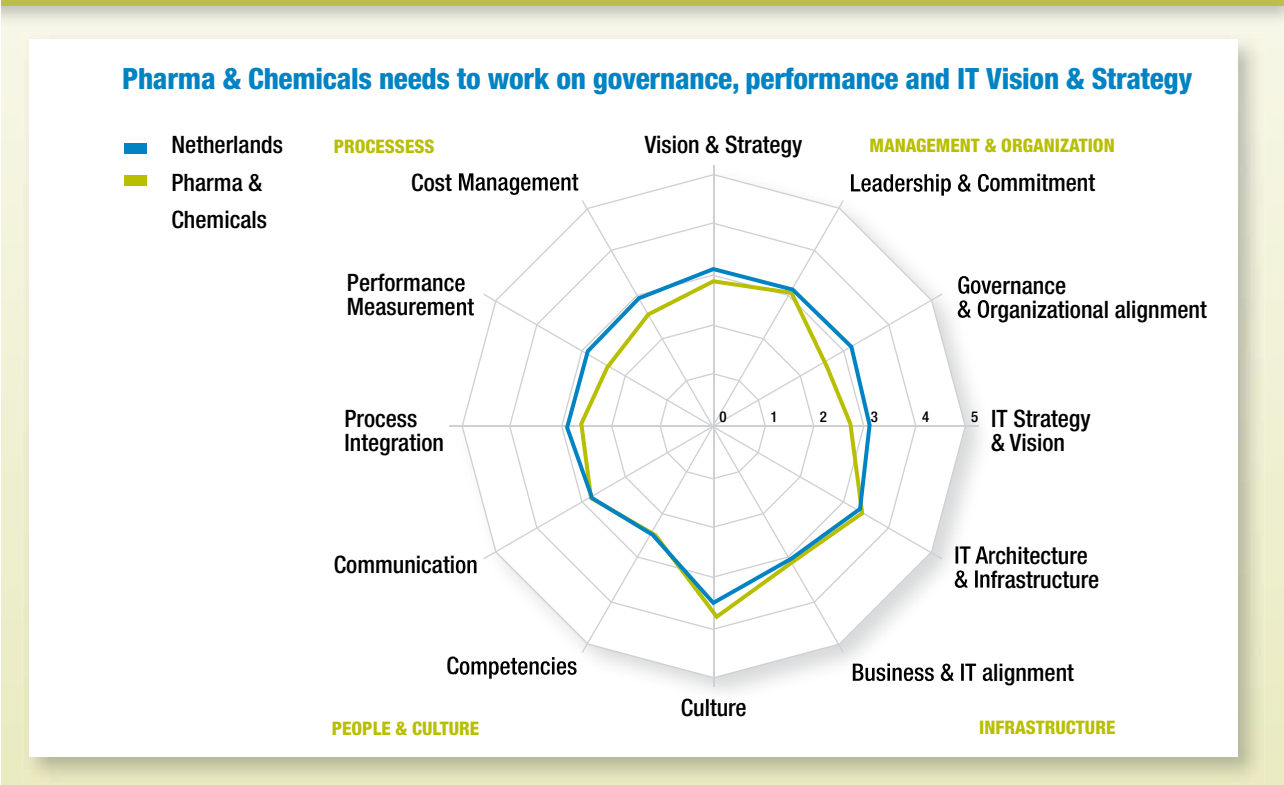


Professional Services are struggling to align the Infrastructure and People & Culture elements in their organizations. Interesting to investigate is the relation between this, the main driver cost reductions and the lack of customer orientation as a driver. Risk is that the focus on cost reductions is leading to an underestimation of the impact of the People & Culture on E-Business maturity.

Fast Forward:

- > **Align business and IT Vision & Strategy as a first step. Revisit the online strategy and opportunities. Evaluate the possibilities to outsource IT components to be able to deliver the cost reductions required**
- > **Set up an E-Business communication program to improve the E-Business culture. Rationale: improving this will lead to better realization of business goals (quick win)**

Figure 28: Industry benchmark of the Pharma & Chemicals sector

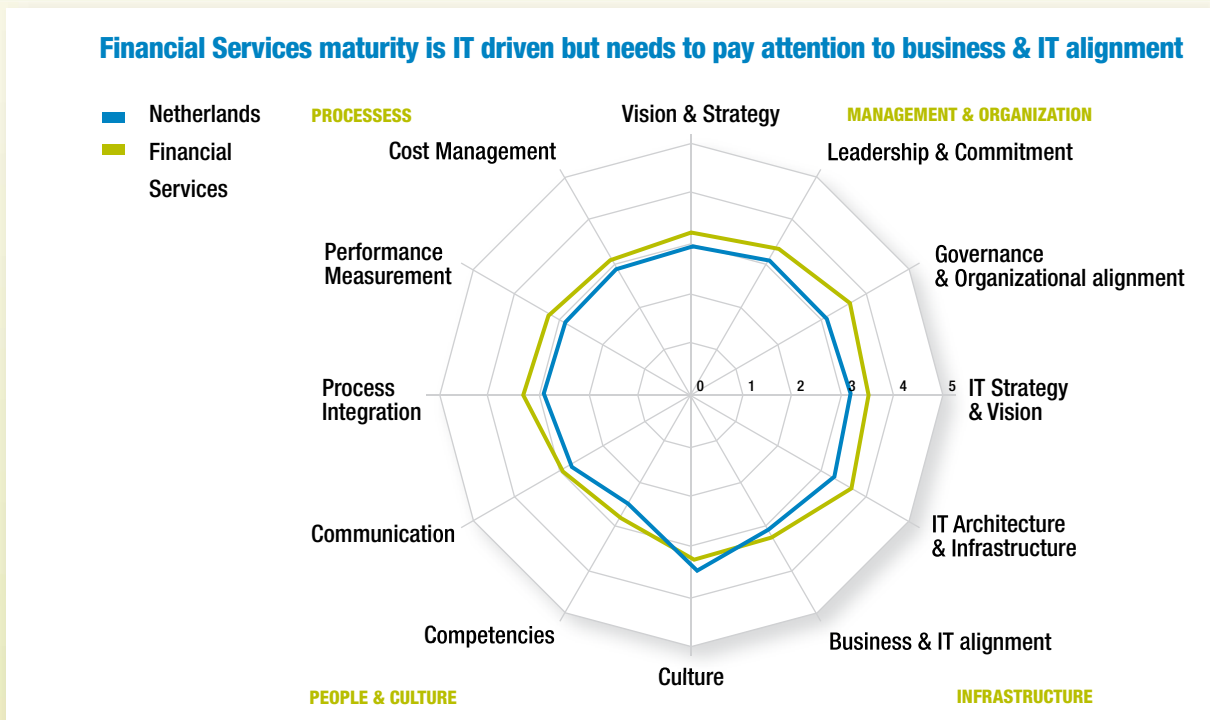


Pharma & Chemicals is striving to become mature at the departmental level. Challenges they face are in the area of Governance & Organizational Alignment, Performance Measurement and People & Culture.

Fast Forward:

- > Align business E-Business and IT E-Business Vision & Strategy together with top management
- > Start leveraging existing building blocks (Culture & Infrastructure)
- > Clarify E-Business Governance and start developing Performance management
- > Re-examine resourcing on current and planned projects, contemplate adding expertise (internal or external). This may be a quick win for effectiveness

Figure 29: Industry benchmark of the Financial Services sector

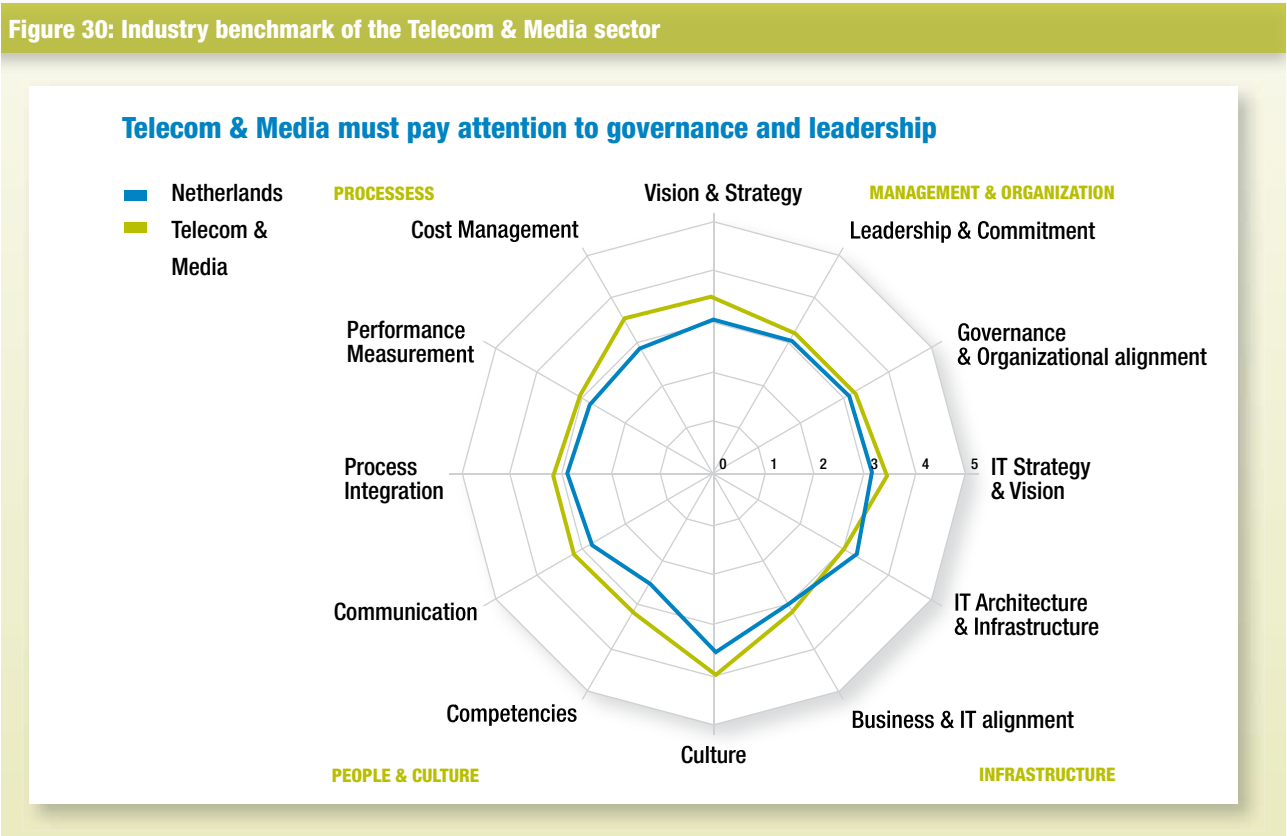


Financial Services E-Business maturity is IT driven but scores lower on IT and E-Business alignment. Business Vision & Strategy is stuck at departmental level. Customer orientation and (lack of) encouragement of top managers are inhibitors for E-Business maturity.

Fast Forward:

- > Work on establishing an E-Business Vision & Strategy from a business perspective, focusing on the strategic value of E-Business at an organizational level
- > Focus on getting correct metrics, E-Business needs to show added value cross organization
- > Improve cross departmental E-Business process integration
- > Quick wins: Improve internal competencies and communication

Figure 30: Industry benchmark of the Telecom & Media sector

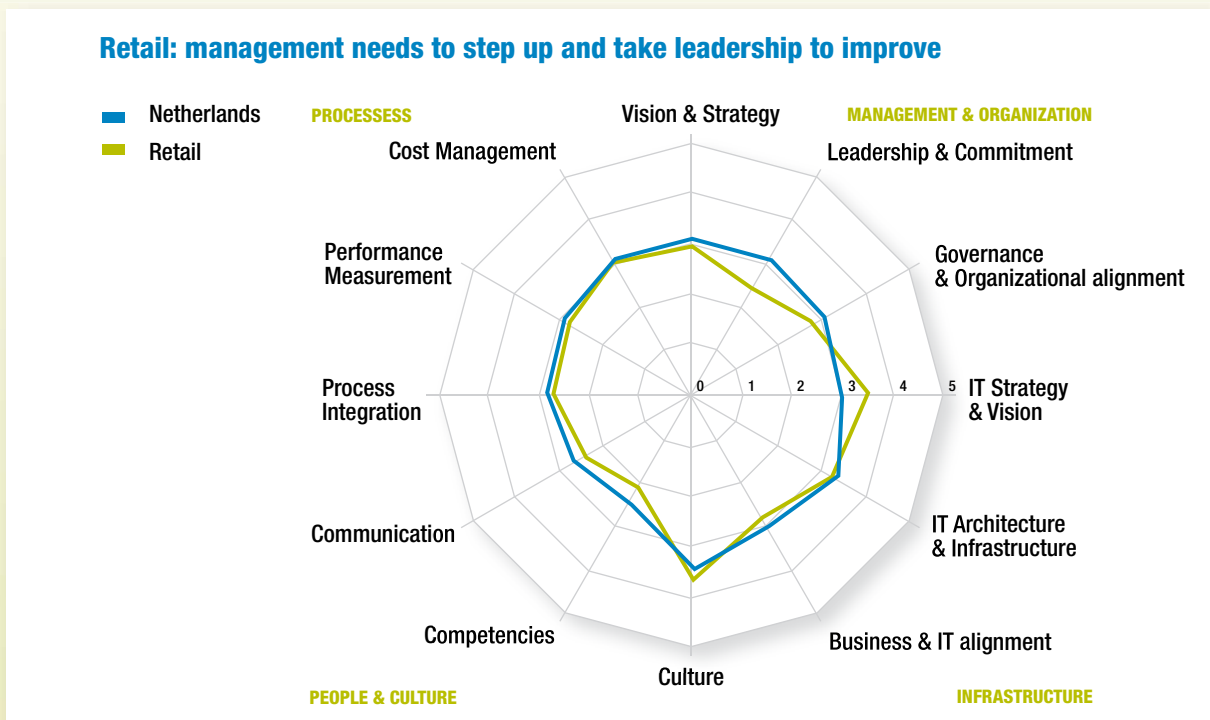


Telecom & Media has a clear focus on online sales and Cost Management. In optimizing their maturity stage, this sector needs to pay attention to the trailing Leadership & Commitment and Governance & Organizational alignment. By doing so, Process Integration can be improved, leading to clear benefits in terms of cost reduction and operational efficiency.

Fast Forward:

- > Leverage leading Vision & Strategy and Cost Management by working cross-departmental and showing E-Business benefits at strategic level
- > Focus on creating clear Governance & Organizational alignment and establish Leadership & Commitment, improving Performance Measurement and Business & IT alignment subsequently
- > Improve Communication to leverage E-Business Vision & Culture

Figure 31: Industry benchmark of the Retail sector

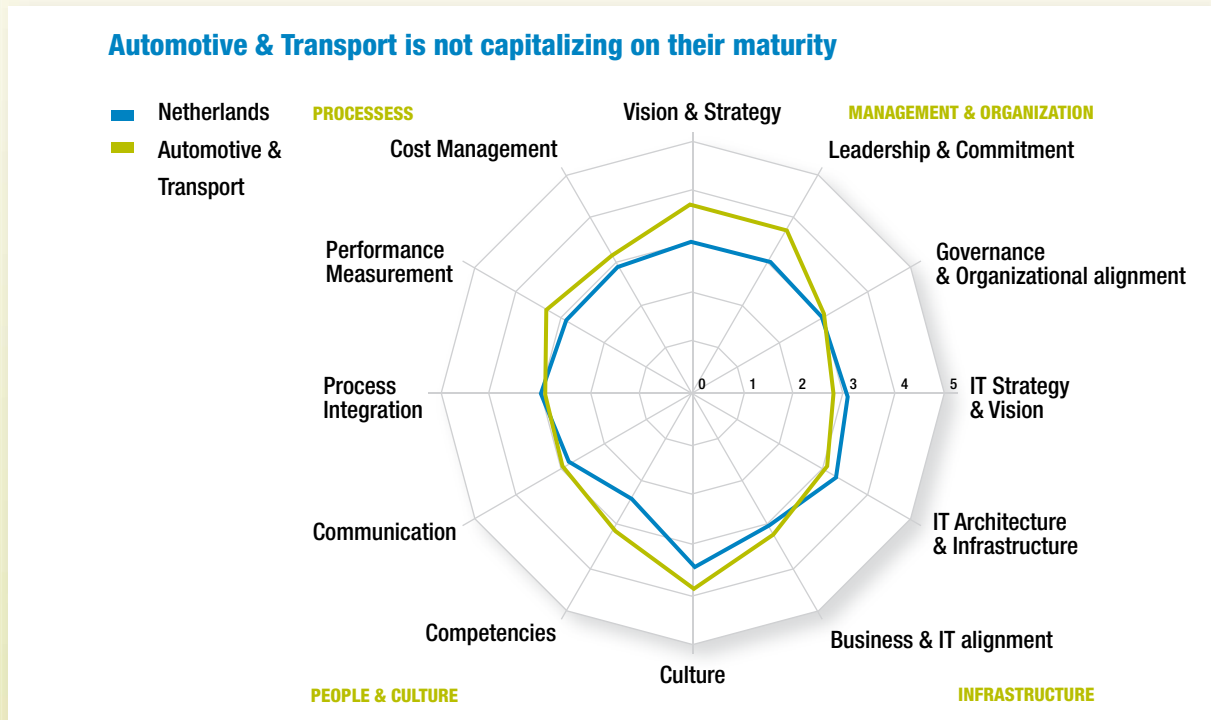


Retail is struggling in optimizing E-Business at a departmental level. The main improvement area is in clarifying Leadership & Commitment and in improving E-Business communication across the organization. Based on our experience, cross departmental communication can be supported by introducing new media solutions such as wiki's and social collaboration platforms in the organization.

Fast Forward:

- > Work on clarifying Governance & Organizational alignment
- > Improve Leadership & Commitment and enhance Communication to support this
- > Focus on improving E-Business communication, for example by introducing new media solutions

Figure 32: Industry benchmark of the Automotive & Transport sector



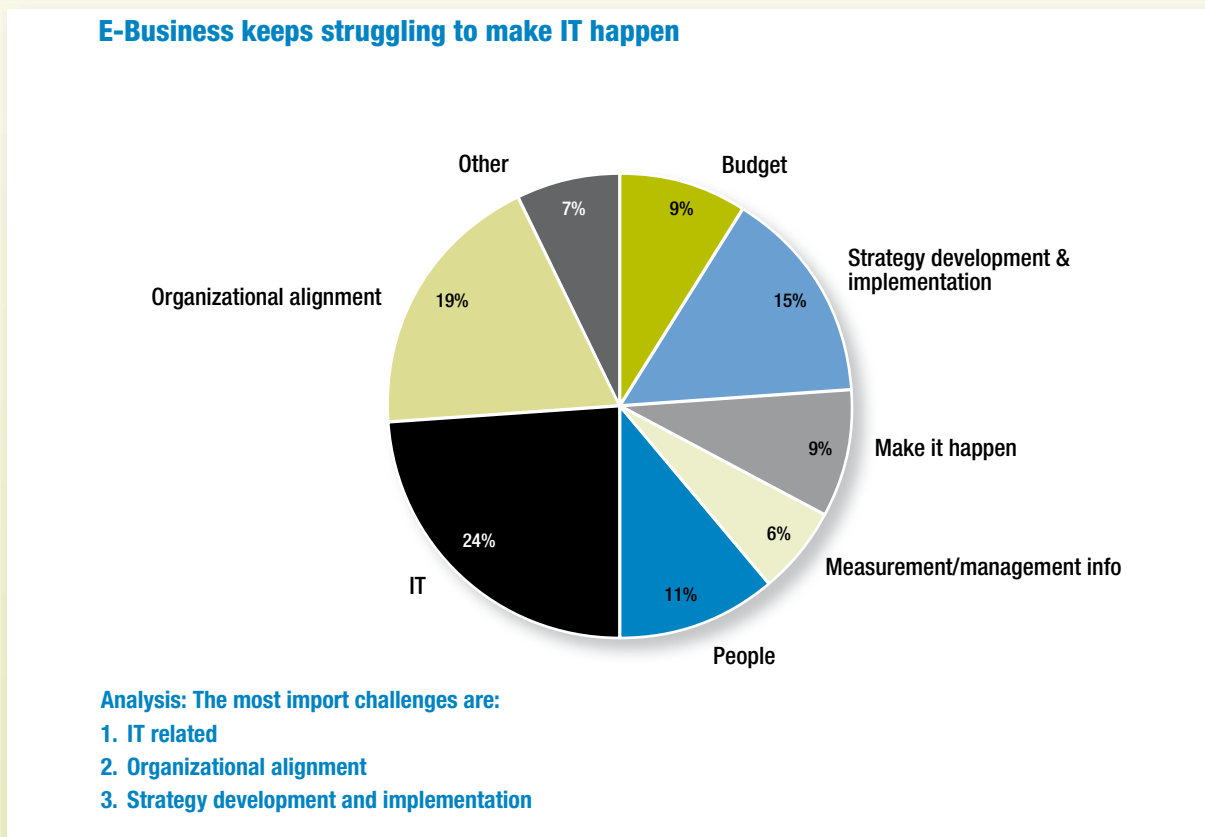
Although the Automotive & Transport sector seems ready to start the transition to the next maturity stage, there is a distinct gap between maturity and contribution of E-Business to turnover. The business Vision & Strategy is leading the way, supported by clear Leadership & Commitment. The trailing IT Vision & Strategy suggests that the cross-departmental coordination and cooperation needs to be improved.

Fast Forward:

- > Benchmark business strategies and look for ways to leverage the maturity stage in terms of contribution to turnover
- > Utilize leading business Vision & Strategy to establish a cross departmental Vision & Strategy, incorporating IT Strategy & Vision
- > Improve Governance & Organizational alignment in clarifying roles, tasks and responsibilities and enhance Performance & Cost measurement based on this. Create clear cross-departmental Governance to stimulate coordination
- > Leverage culture to facilitate the move to maturity stage four

CHALLENGES AND INITIATIVES FOR 2009

Figure 33: Main E-Business Challenges for 2009



The largest E-Business challenges for organizations are IT related. Challenges identified are:

- > alignment of E-Business activities within the IT organization
- > integration of legacy IT systems to deliver E-Business functionalities
- > requirements for E-Business are not met by the current IT landscape

Recommendation: Start differentiating between short and long term projects, (re)organize IT accordingly and/or contemplate outsourcing either stream.

This will enable the IT organization to be more flexible in meeting business demand, getting better results

The second most important challenge is aligning the organization. Organizations have difficulties in standardizing E-Business processes and procedures, both within departments and specifically across their entire organization. Bottom line, clear ownership of processes, procedures, channels and applications should be situated in order to mature organizational alignment.

Recommendation: Clarify governance and ownership (not only E-Business) for all customer facing processes. Put a cross departmental/functional central E-Business team in place, working on creating an integrated E-Business Roadmap for business and IT

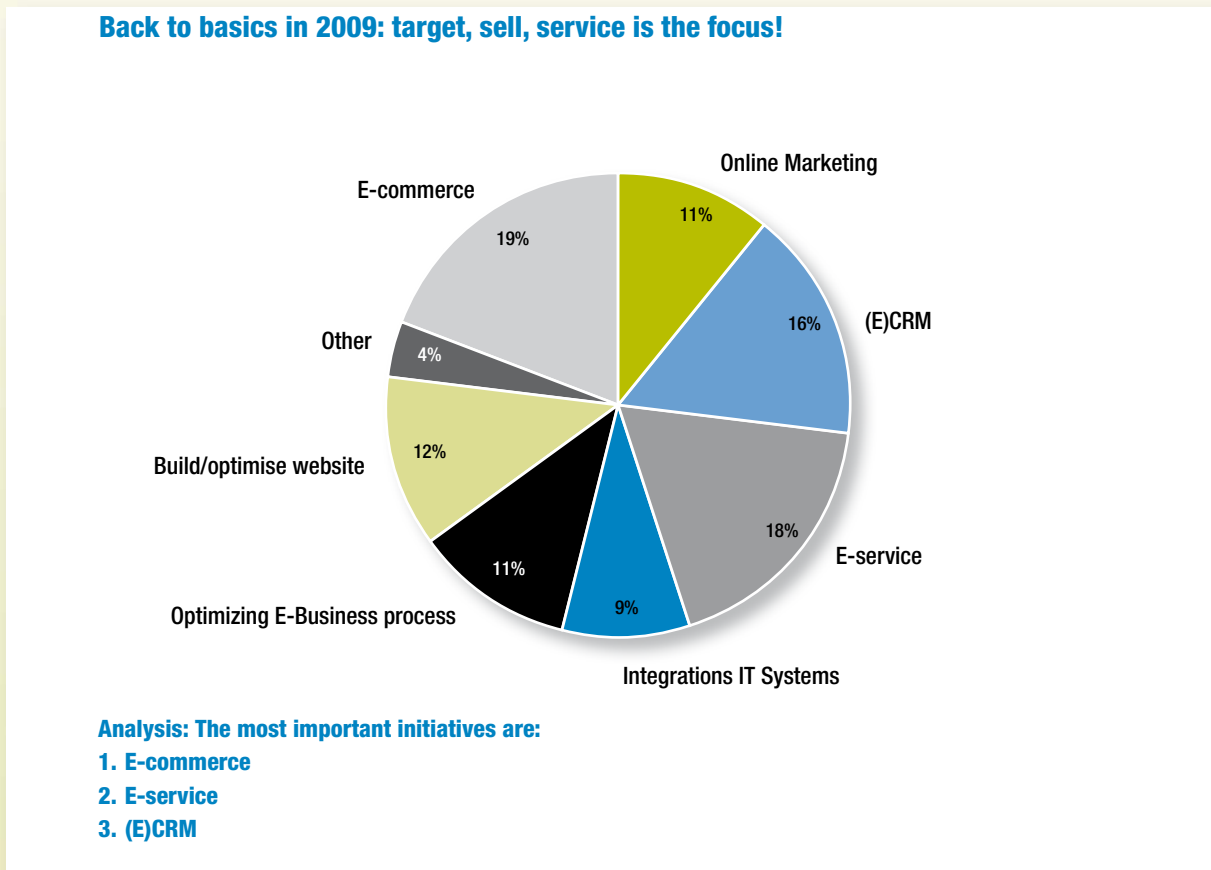
In line with the findings of several sectors, organizations are fighting to get senior management to step up and take ownership of E-Business. This will only happen when E-Business' strategic value is seen at organization level. Getting and keeping management attention is challenging, especially when top management is old school.

Remarkable: Only 6% of respondents see measurement/management info as a challenge for next year. This can either mean that organizations are fully

aware of their challenges in this area and view appropriate measures as relatively easy to implement. On the other hand, this may indicate that performance measurement and metrics are underestimated as a key success factor for E-Business maturity

Recommendation: put performance management high on your agenda for 2009. Specifically in light of the economic downturn, E-Business must be able to demonstrate added value at organizational level to get proper management attention

Figure 34: Main E-Business Initiatives for 2009



E-Commerce closes in at first place in a tight race as the most important initiative for 2009 (19%). This includes the creation of e.g. web shops, building an e-commerce web team, and so on. This is in line with general objectives.

The second most important initiative for 2009 is E-service. As this benchmark was held just before the main effects of the economic downturn became apparent, expectations are that the focus on customer self service, driven by cost reductions and customer retention, will be higher on the agenda for 2009.

START OPTIMIZING YOUR E-BUSINESS ORGANIZATION

When we started developing the 'E-Business Maturity Model', one of the aims was to establish a generic model helping organizations understand their route towards E-Business maturity. By developing a comprehensive model, covering all aspects of the organization, in combination with an accepted model of maturity stages, we did not only achieve that, but much more.

The 'E-Business Maturity Model' now serves as a basis to identify the current maturity stage, the improvement areas to get the most out of the current stage, insight in the desired stage and the steps which need to be taken to get there. All of this benchmarked against industry best practices.

Based on the Benchmark the main conclusions and recommendations are:

KEY CONCLUSIONS

1. Strategy: E-Business is not seen as strategic at organizational level. E-Business maturity remains at the departmental level stage. This implies that E-Business risks being in a functional silo, without sufficient support in the organization, leading to clear-cut inefficiency and insufficient utilization of the E-Business potential. Indicator of this is that often, business and IT strategies are not at the same maturity level.

2. Governance: control over E-Business is firmly in the hands of marketing. Because of this, the cross-departmental alignment remains the main challenge. Decentralized and direct channel organizations have the largest E-Business teams. The majority having up to 50 specific E-Business employees. Decentralized E-Business organizations struggle with leadership, governance and competencies.

3. Leadership: Encouragement of top management is a prerequisite for alignment but is running behind in most sectors. This is a serious inhibitor for getting the most out of the E-Business organization. Senior management needs to step up and take ownership of E-Business.

This Benchmark research not only validated the model we developed in all aspects covered, it also has shown that E-Business organization improvement is a hot topic. It touches almost every organization in the Netherlands, especially relevant in the light of the recent economic downturn. With budgets being scrutinized, additional pressure is on the E-Business organization to perform.

The 'E-Business Maturity Model' can now be used as a self diagnostic tool by organizations to identify their own improvement areas and quick wins. However, we recommend that organizations use several participants, preferably from management, marketing, sales, service, IT and E-Business groups.

4. Integration: lack of clear governance and responsibilities at departmental level cause E-Business process integration to struggle. There is a direct relationship between Governance and the level of Process Integration.

5. Performance: measuring E-Business contribution and costs is still not common practice: 35% of organizations do not measure E-Business contribution at organizational level. For those who do, only 16% of organizations see E-Business contribute more than 25% to turnover.

6. Alignment: The struggle to make IT happen is a clear indication of the room for improvement. On the other hand, Business & IT alignment usually scores higher than Process Integration, indicating that organizations are able to work together at a planning stage, but have much more difficulties in aligning the nitty gritty of the different (and differing) processes.

7. People & Culture: employees usually are more open towards E-Business and willing to embrace it, but are looking for management guidance and support to lead the way. Most notably, internal communication regarding E-Business projects and successes is often lacking. Insufficient competencies and internal support to develop them, poses a main barrier to successfully realizing E-Business potential.

RECOMMENDATIONS:

1. Verify that the current maturity of your E-Business organization is in line with strategic business objectives, on-line strategies and meets performance criteria. Benchmark against external parties but be careful in choosing them, include other customer groups and sectors.

2. Build sponsorship and involvement at senior and operational level by showing the real value of E-Business for the organization.

3. Clarify E-Business ownership (governance, roles & responsibilities) but also review governance and ownership for all customer facing processes. Make ownership transparent throughout the whole organization. Leverage the positive culture towards E-Business to do this.

4. Bridge the gap between different units in the organization, specifically marketing and IT, by establishing

a cross departmental E-Business steering team. Work on creating an integrated E-Business roadmap. Pay attention to improving E-Business process integration (cross-departmental) and Business & IT alignment.

5. Invest in improving E-Business performance and cost measurement. Include cross-channel measurement metrics to determine the real value for the organization. Continually measure E-Business performance and take corrective action where needed.

6. Specify the desired internal E-Business competences, roles and location. Invest in developing in house E-Business competencies (cross departments).

7. Contemplate (re)organizing IT: start differentiating between short and long term projects, (re)organize IT accordingly and/or contemplate outsourcing either. This will enable the IT organization to be more flexible in meeting business demand, getting better results.

APPENDIX 1: RESEARCH APPROACH

In order to be able to arrive at an E-Business Maturity Benchmark, three research phases were constructed:

Table 6: Summary of research approach

Road to Benchmark

Activity	Purpose
Research Phase 1: Qualitative research	
Literature review	Existing maturity models were reviewed to assess their current applicability
Initial E-Business Maturity Model	Based on several maturity models available within Atos Consulting (ECM, Knowledge Management, Cost Management), a draft EBMM was developed
Qualitative research: In-depth interviews	Several in depth interviews were held to validate the 'E-Business Maturity Model' and determine best practices. The first phase involved interviews with E-commerce/Digital marketing managers at: Canon, Philips CE, Organon, NXP, Akzo Nobel, Philips Lighting.
Review research findings and draft EBMM	Based on the interviews, the model was evaluated and adapted.
Expert Panel discussion	Interviewees and E-Business managers from similar organizations were invited to discuss the findings of a draft report based on the first in-depth interviews.
Finalize EBMM	Based on the feedback from the Expert Panel discussion, the EBMM was finalized.
Research Phase 2: quantitative research	
Setting up benchmark questionnaire	Formulating several questions in order to assess the general E-Business landscape. What are E-Business contribution and budgets? Which subsidiary departments have formal control of E-Business?
Identifying key drivers and inhibitors	Based on literature, the key drivers and inhibitors and their measurement questions are identified. The assessment of these drivers and inhibitors are part of a master thesis.
Assessment of the survey	From these questions a draft survey was developed.
Execution	The questionnaire was pretested with TomTom, Essent, Nuon and Achmea. We invited participants by email and by several blogposts on: www.marketingfacts.nl , www.molblog.nl , www.maxx-online.nl
Research Phase 3: reporting	
Research report	Research topics discussed in this document: <ul style="list-style-type: none"> > Topic 1: General information <ul style="list-style-type: none"> • Determining the differences in company size, organizational role and level in the organization. > Topic 2: E-Business Maturity Model <ul style="list-style-type: none"> • Determining E-Business maturity in terms of organizational aspects and maturity stages. > Topic 3: E-Business drivers & inhibitors <ul style="list-style-type: none"> • Determining internal and external factors influencing E-Business maturity. > Topic 4: E-Business initiatives & challenges <ul style="list-style-type: none"> • Determining future steps in relation to current situation.

ABOUT

The E-Business Maturity Benchmark is a research conducted by the Atos Consulting™ Trends Institute.

About Atos Consulting™

Atos Consulting, the global consulting practice of Atos Origin, is a leading provider of business, process and technology consulting services. With more than 2,500 staff globally, it focuses on delivering pragmatic solutions to the telecom, manufacturing, financial services and public sectors.

Atos Consulting sees online challenges of organizations as an important challenge. Within the 'Customer Management' practice we work at solving commercial

challenges for our clients. Our consultants work from a solid field experience. With their clear vision and application of innovative methods and techniques in the field of marketing, sales and customer service, they contribute to the improvement of the commercial function of medium and large organizations, over the full customer life-cycle, in the profit and non-profit sector.

Our approach is characterized by the integration of content and process. The starting point is the question our customer has and together we find suiting, supported and therefore effective solutions.

More information on: www.atosconsulting.nl

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First of all, we would like to thank all the professionals who used their valuable time to provide us with the answers to our Benchmark questions. Without your participation, this research would not have been possible. We take this as a sign that E-Business is growing in importance.

RESEARCH TEAM

Gijsbert van der Sleen – Principal Consultant Online Customer Management

What can be better than combining passion and work? Over the past two years I have been working on setting up a new E-Business Maturity Model. Starting small, I have seen it grow into the first comprehensive E-Business Maturity Benchmark of the Netherlands. Next step? Well, I will definitely be looking at the possibilities of making this an international benchmark.

Philip Könings – intern and lead researcher

The last six months of my life this research took a central place. Words like frustration, enthusiasm, highs and lows are all applicable, but the most important one is innovation. It was great to be part of obtaining new insights in a field what is, and increasingly will become, very important. Besides getting my Masters degree, the enthusiastic responses of organizations made it all worth while.

Rudy Taels - Business Consultant

After having conducted research into online communities, the general E-Business field grabbed my interest. This again is something, if understood and utilized correctly, of great value to organizations in the new millennium. Besides this creating something practical and usable for organizations is very satisfying.

We, as a research team, have been supported by a number of colleagues whose input made this benchmark possible. We would like to thank:

Han van der Zee – Director Atos Consulting Trends Institute

Wim Boogaard – Partner Customer Management

Martin Boschhuizen – Executive Business Consultant Financial Services

Rob Jorg – Principal Consultant Telecom, Utilities & Media

Patrick Filius – Senior Business Consultant Consumer & Industrial markets

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