



THAT VISION OF DIGITAL TRANSFORMATION? **NOT SO CLOUDY AFTER ALL...**

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Software is
**EATING
THE WORLD!**



Software is a
\$350B
INDUSTRY
that powers digital transformation
for every company on the planet



BUT THE LANDSCAPE IS EVOLVING QUICKLY.



BUSINESS AS USUAL NO LONGER WORKS

Customer Experience

Key drivers of digital transformation are profitability, customer satisfaction, and increased speed-to-market. Improving the experience of customers is top strategic priority – *Forrester Consulting research study*

Technology Shift

“Companies are being replaced on the S&P approximately every two weeks. Technology has driven this shift, and companies that want to succeed must understand how to merge technology with strategy.” - *John Marcante, CIO Vanguard*

Digital Transformation

“One-third of the top 20 firms in industry segments will be disrupted by new competitors within five years," and that it's a matter of "**transform or perish.**” – *IDC, FutureScape: Worldwide CIO Agenda*



\$350B

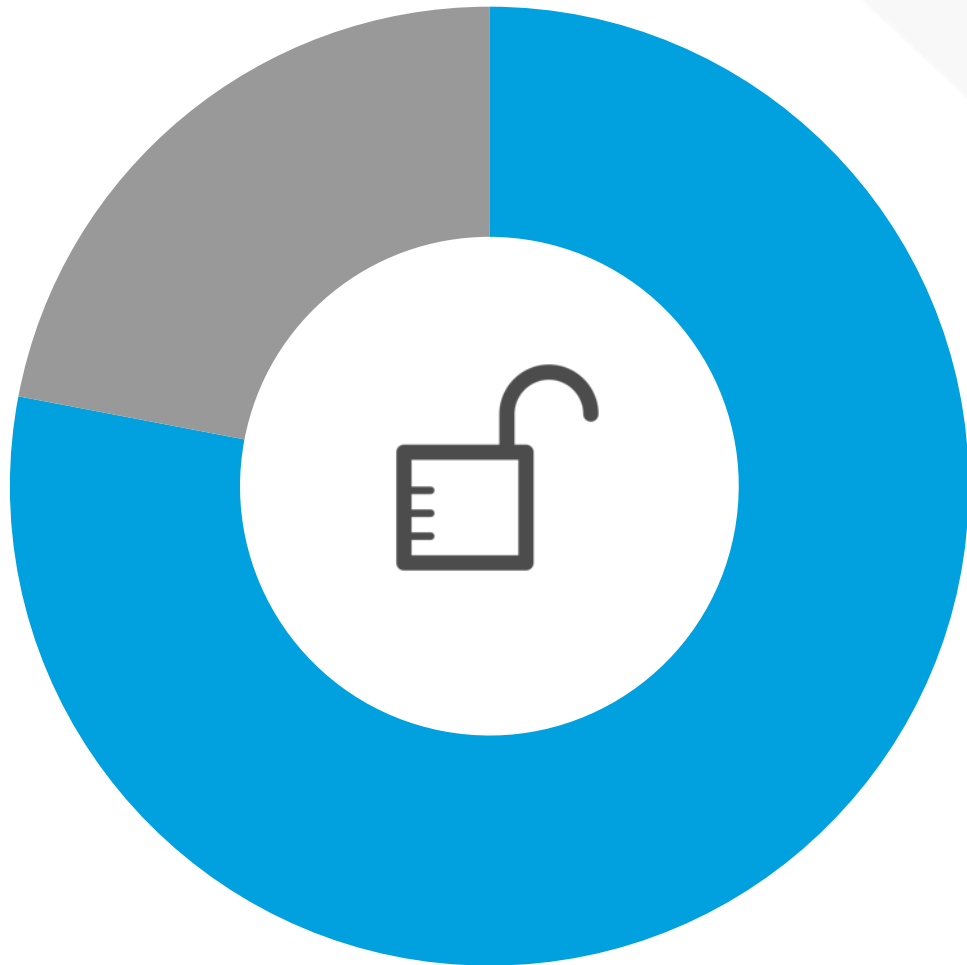


\$597B

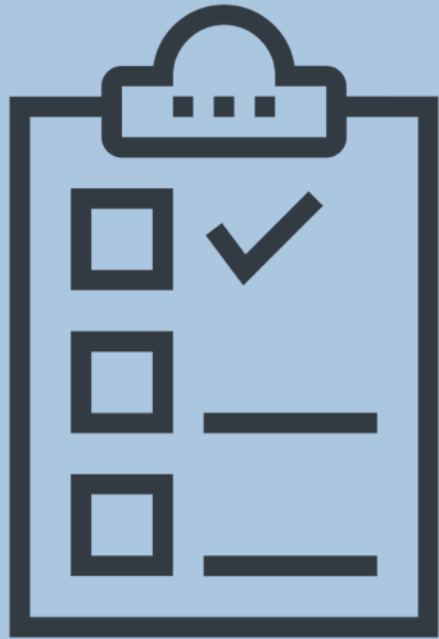
WITH SaaS/CLOUD

↑23% YR/YR

[illegible]



78% of companies are using
open-source
software up from **42% in 2010**



License agreements have more

**rights, rules,
and caveats**

THAN EVER BEFORE

3+

DEVICES
PER USER

**HARDWARE
SPRAWL**

80B

IoT DEVICES
IN 2025

industry opportunities market investment product research

PACE OF CHANGE business analysis threats

market buyer **IS** definition market analysis organization

cost definition identify **INCREASING** potential invest

strategy financial on premise software area producer consumer

market research opportunities business cloud strengths market

“

The worldwide public cloud services **market** is **projected to grow** from **\$247 billion in 2017** to a total of **\$384 billion by 2020**”

“

By 2019, more than **30%** of the **100 largest vendors'** new software investments **will have shifted from cloud-first to cloud-only.**”

”

**WHAT HAPPENS WHEN
MANAGEMENT METHODS
DON'T KEEP UP WITH CHANGE?
THE BUSINESS SLOWS DOWN**



AND WHY AREN'T WE KEEPING UP?

Software is the single most

DYSFUNCTIONAL

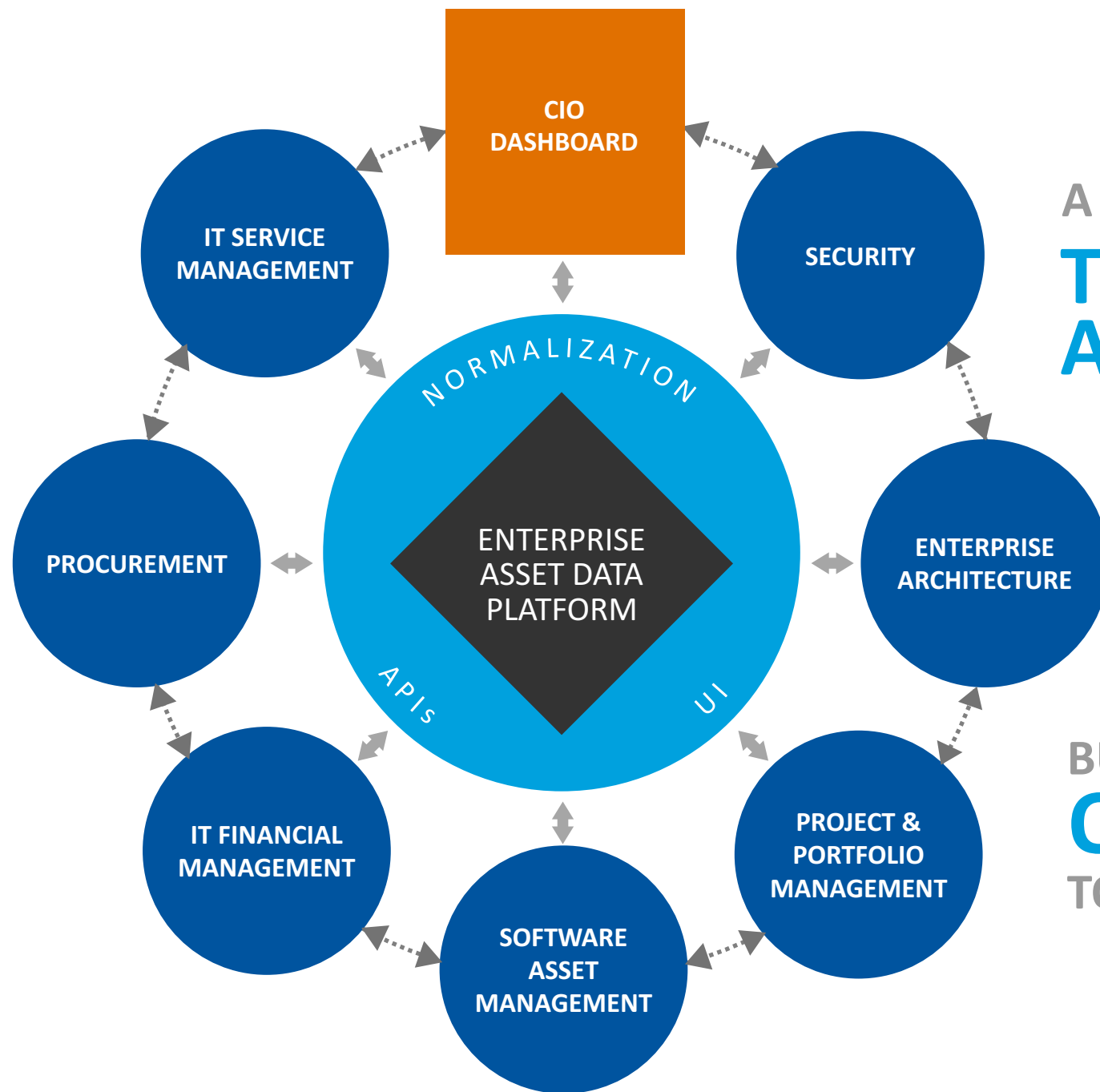
Supply chain in all of industry today...



THE WAY TO FUEL DIGITAL TRANSFORMATION

**BETTER INTELLIGENCE
MORE OPTIMIZATION AND VISIBILITY
EASIER WAYS TO STAY PROTECTED**





A NEW BROADER APPROACH:
**TECHNOLOGY
ASSET MANAGEMENT**

BUILT ON AN
OPEN PLATFORM
TO ACCESS RICH ASSET DATA

BENEFITS FOR SOFTWARE SUPPLIERS AND BUYERS



Imagine a software supply chain where

TRANSPARENCY
+ TRUST
= TRANSFORMATION



If we can imagine it...

WE CAN DO IT





THANK YOU

www.flexera.com

WE'RE WORKING WITH TOP
SOFTWARE VENDORS AND
SEEING RESULTS

50% OF OUR CUSTOMERS
SEE 100% ROI in **30 days**

90% OF OUR CUSTOMERS
SEE 100% ROI in **1 year**





TBM EUROPEAN SUMMIT 2018

Fuelling **Agility**



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