



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

Tom Canning  
SVP Strategy, Flexera

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*



industry

opportunities

product  
research

investment

product

market

buyer

cost

definition

identify

strategy

market research

opportunities

financial

on premise

**SPEND**

**IS**

**INCREASING**

software

producer

consumer

business

cloud

strengths

market

analysis threats

definition

invest  
potential

market

analysis

organization

identify

area

**\$350B**

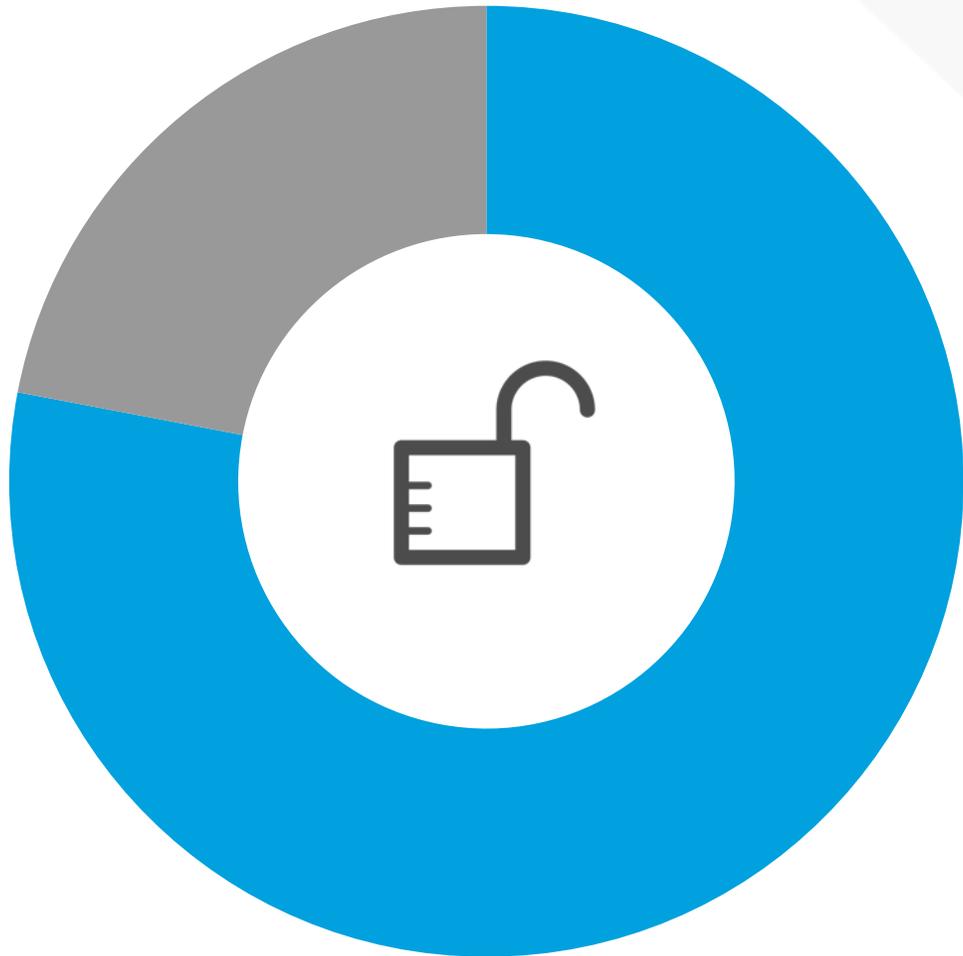


**\$597B**

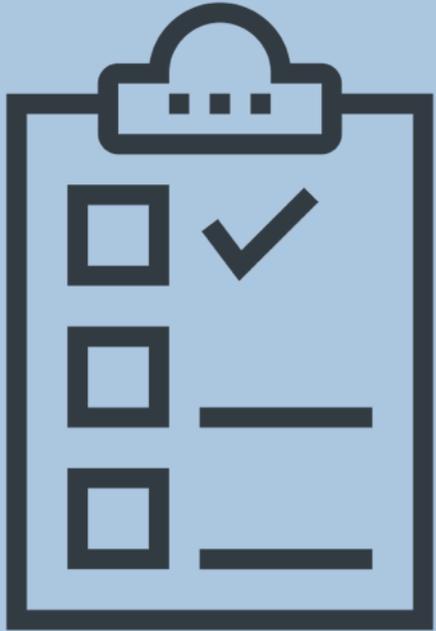
WITH SaaS/CLOUD

**↑23%** YR/YR

industry  
opportunities  
market investment  
**COMPLEXITY**  
product  
research  
business analysis threats  
market  
analysis  
organization  
identify  
invest  
potential  
market  
definition  
**INCREASING**  
software  
area  
producer consumer  
business cloud  
strengths  
market  
cost  
buyer  
definition  
identify  
strategy  
market research  
opportunities  
financial  
on premise  
software  
producer  
consumer  
business  
cloud  
strengths  
market



**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  
analysis  
definition  
invest  
potential  
organization  
identify  
cost  
buyer  
definition  
identify  
**strategy**  
market research  
opportunities  
financial  
on premise  
**IS**  
**INCREASING**  
potential  
software  
area  
producer  
consumer  
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

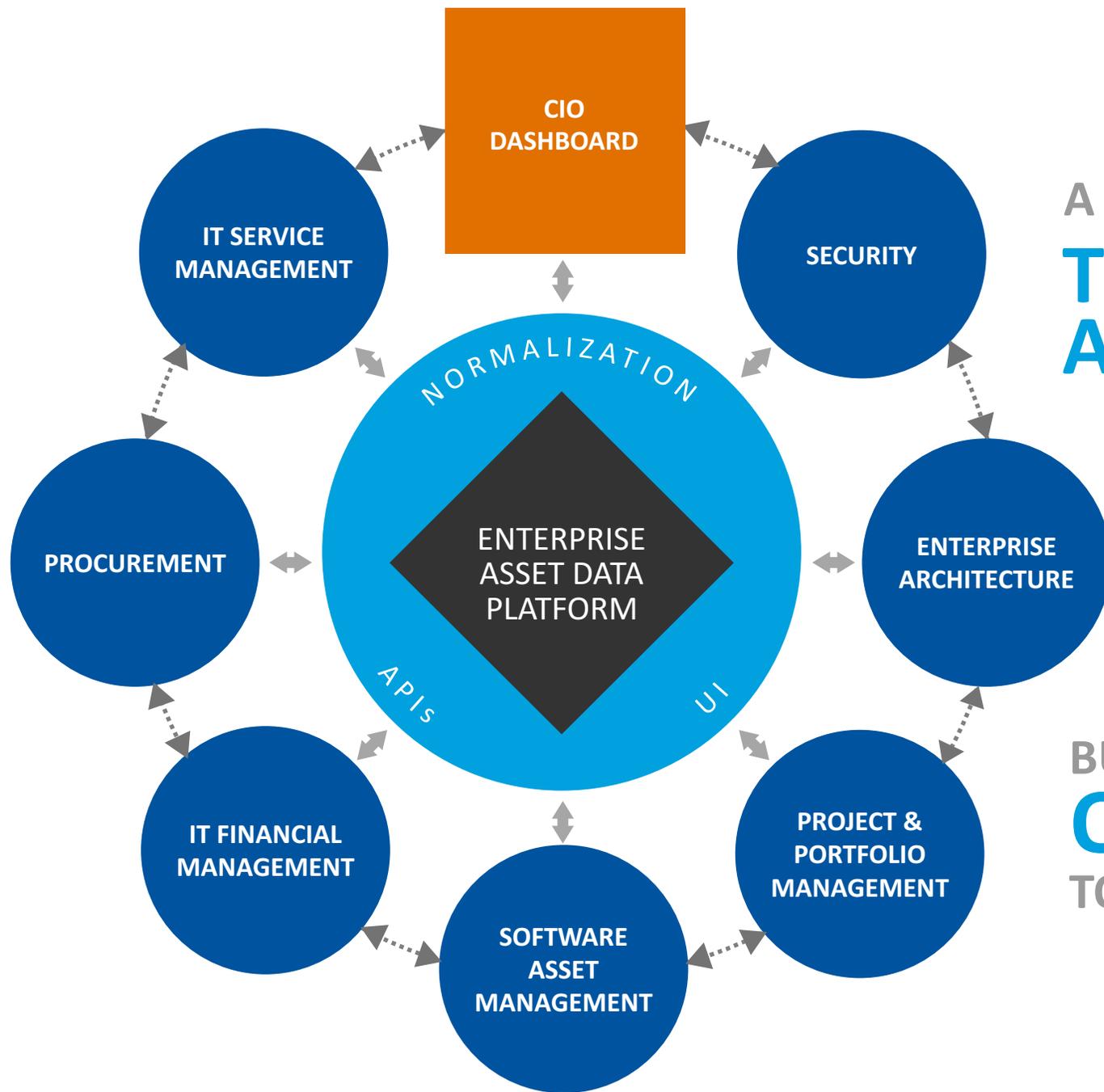
# FUEL DIGITAL TRANSFORMATION

**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**



**Flexera**

**THANK YOU**

[www.flexera.com](http://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**

# TBMS18

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