



Transforming business for the digital age

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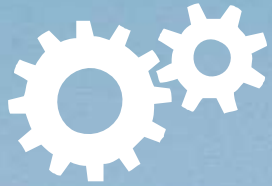
Delivery Lead



Our society & technology

An **invisible** revolution is coming





Steam, water,
mechanical
production equipment

1784



Division of labor,
electricity, mass
production

1870



Electronics,
IT, automated
production

1969



**Blurring the
physical and
the digital
divide**

2016

WORLD
ECONOMIC
FORUM

Industrial Revolution 4.0

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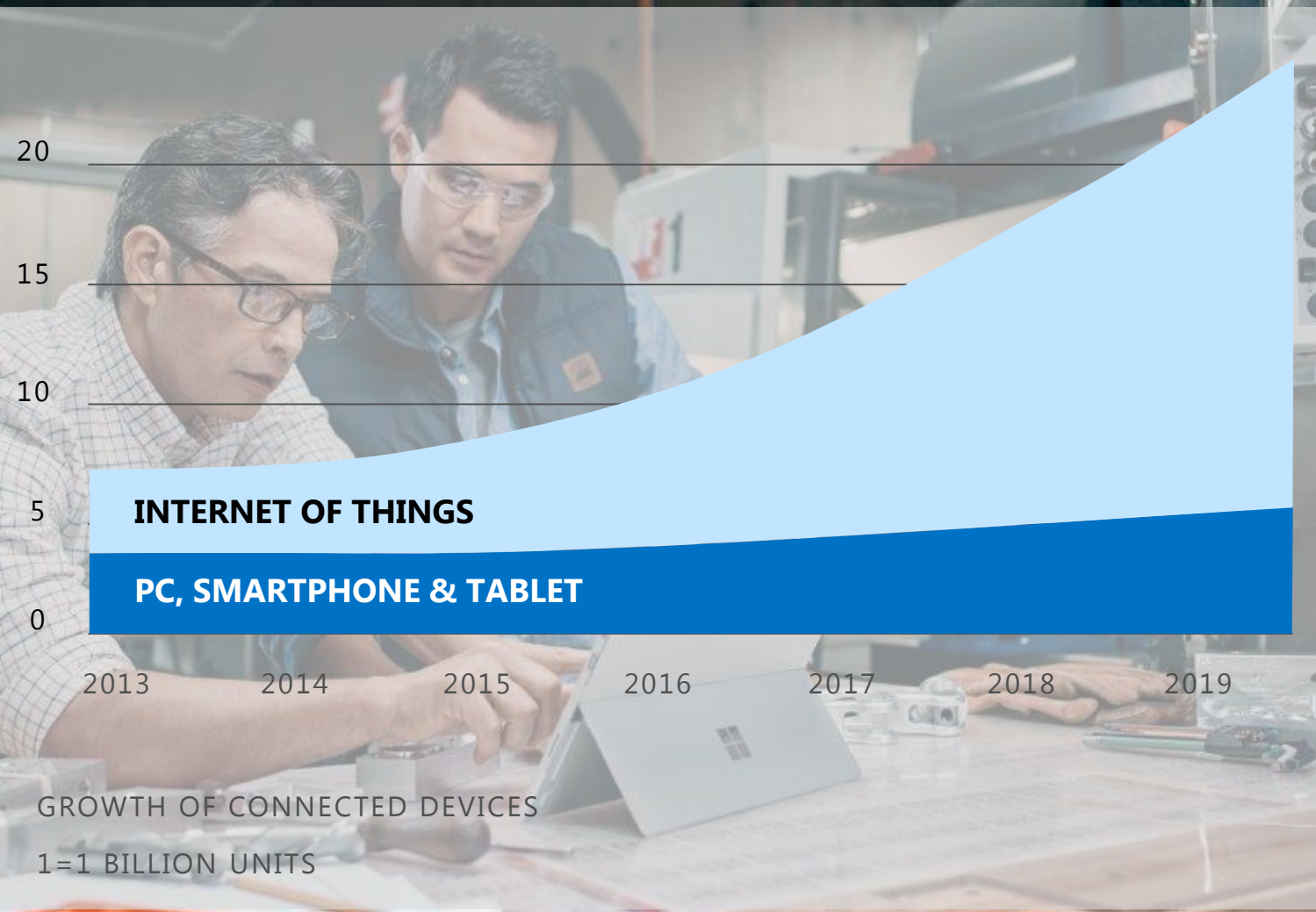
Data



Analytics



Cloud



GROWTH OF CONNECTED DEVICES
 1=1 BILLION UNITS

Data is increasing at rates never witnessed before

● 0.16
2006

4.4
2013

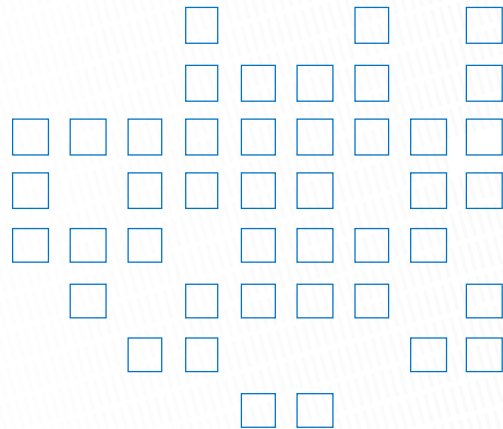
44 ZETTABYTES
2020 OF DATA

1 ZETTABYTE = 1B TERABYTES



Cloud
Economics is
paving the way

Operationalizing digital transformation priorities



Digital transformation =
Cultural shift
technology problem ¹

RIGHT SKILLS shortage



The most commonly cited **barrier to digitization** for most CIOs ²

Central to any **digital workplace initiative**:



increasing the involvement of the employee community in **technology strategies** ³

Organizations can't transform to digital unless people do

42%

of CIOs with hiring plans are in search of people with combined

TECH + BUSINESS backgrounds ⁴

Most important decision

CEOs must make in **2016** is to



invest in **data science** development ⁵

The **CIO's challenge** is to convince the entire enterprise that

"SECURE BY DESIGN"

should be treated as a **business priority** ⁶

Leaders embrace digital-first to fast track transformation

By **2018**, **AI** will be incorporated into **1/2**



of all apps developed. By **2020**, savings garnered by AI-enabled efficiencies are expected to total an estimated **60B** for U.S. enterprises ⁷

29%

of the respondents identified **IoT initiatives** — and related **machine-to-machine and telematics projects** — as new areas of spending for the year ahead ⁸

30%

By the end of 2016, of businesses will have begun **monetizing their information assets**, which is fueling an information-driven economy targeted at **\$156B** ⁹

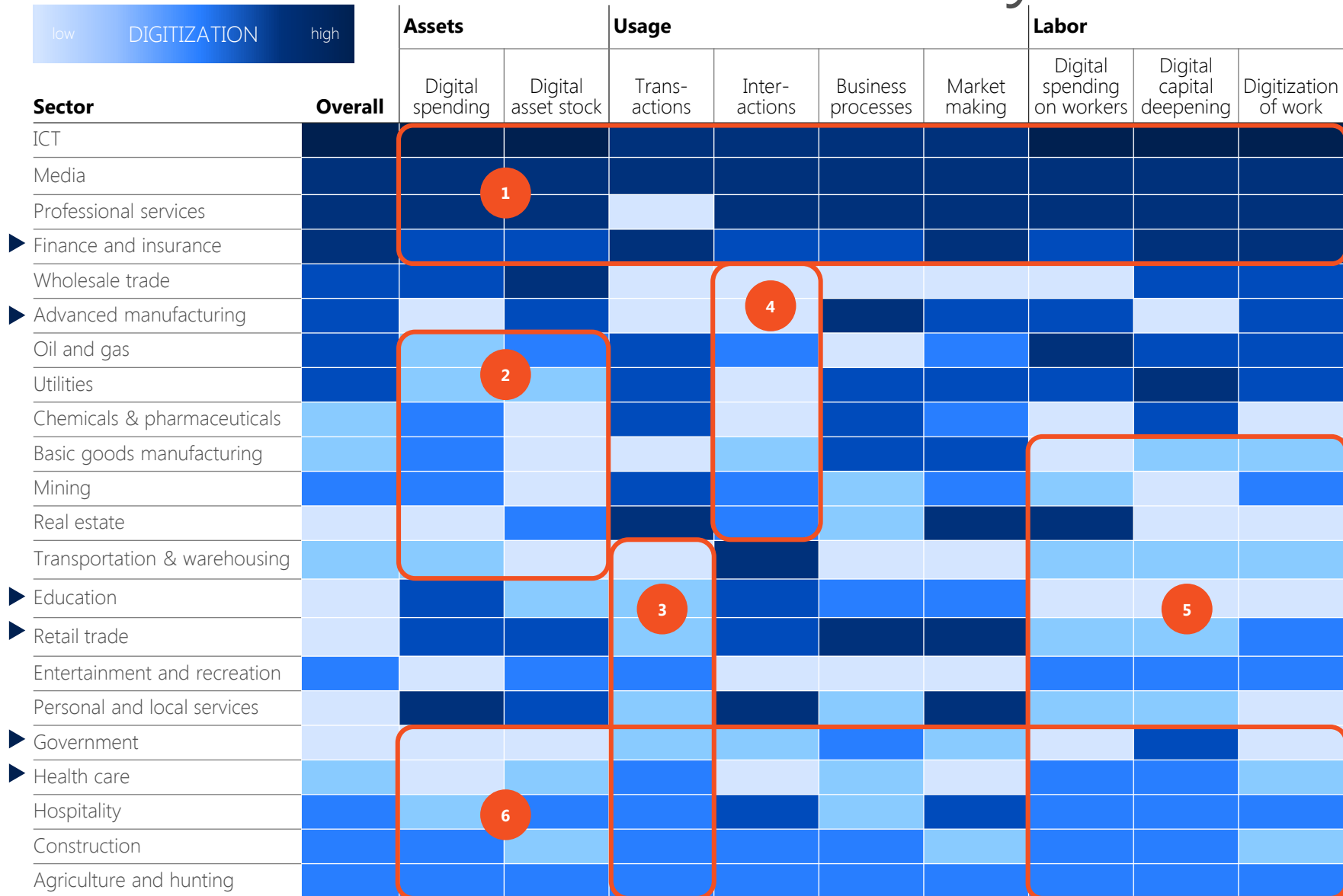
Harness information to change the way you do business

¹ Forrester Research. The race to digital mastery is on in 2016. Forrester. November 11, 2015.
² Andy Rowsell-Jones, et al. 2016 CIO Agenda: Global Perspectives on Building the Digital Platform. Gartner. February 23, 2016.
³ Matthew W. Cain and Paul Miller. Recipe for Digital Workplace Execution: Transform the Employee Experience. Gartner. March 3, 2016.

⁴ Beth Stackpole. Forecast 2016: 5 fast-track trends to tackle now (and one to ignore). CIO. December 1, 2015.
⁵ Ken McGee and Mark Raskino. The Most Important Digital Business Decision Senior Executives Must Make in 2016. Gartner. February 16, 2016.
⁶ Marcus Shingles et al. Tech Trends 2016: Innovating in the digital era. Deloitte. February 22, 2016.

⁷ John Dodge. Who's in charge of AI in the enterprise? CIO. February 15, 2016.
⁸ Beth Stackpole. Forecast 2016: 5 fast-track trends to tackle now (and one to ignore). CIO. December 1, 2015.
⁹ Mike J. Walker, et al. Top 10 Strategic Technology Trends for 2016: Information of Everything. Gartner. February 26, 2016.

...and it's relevant for every industry

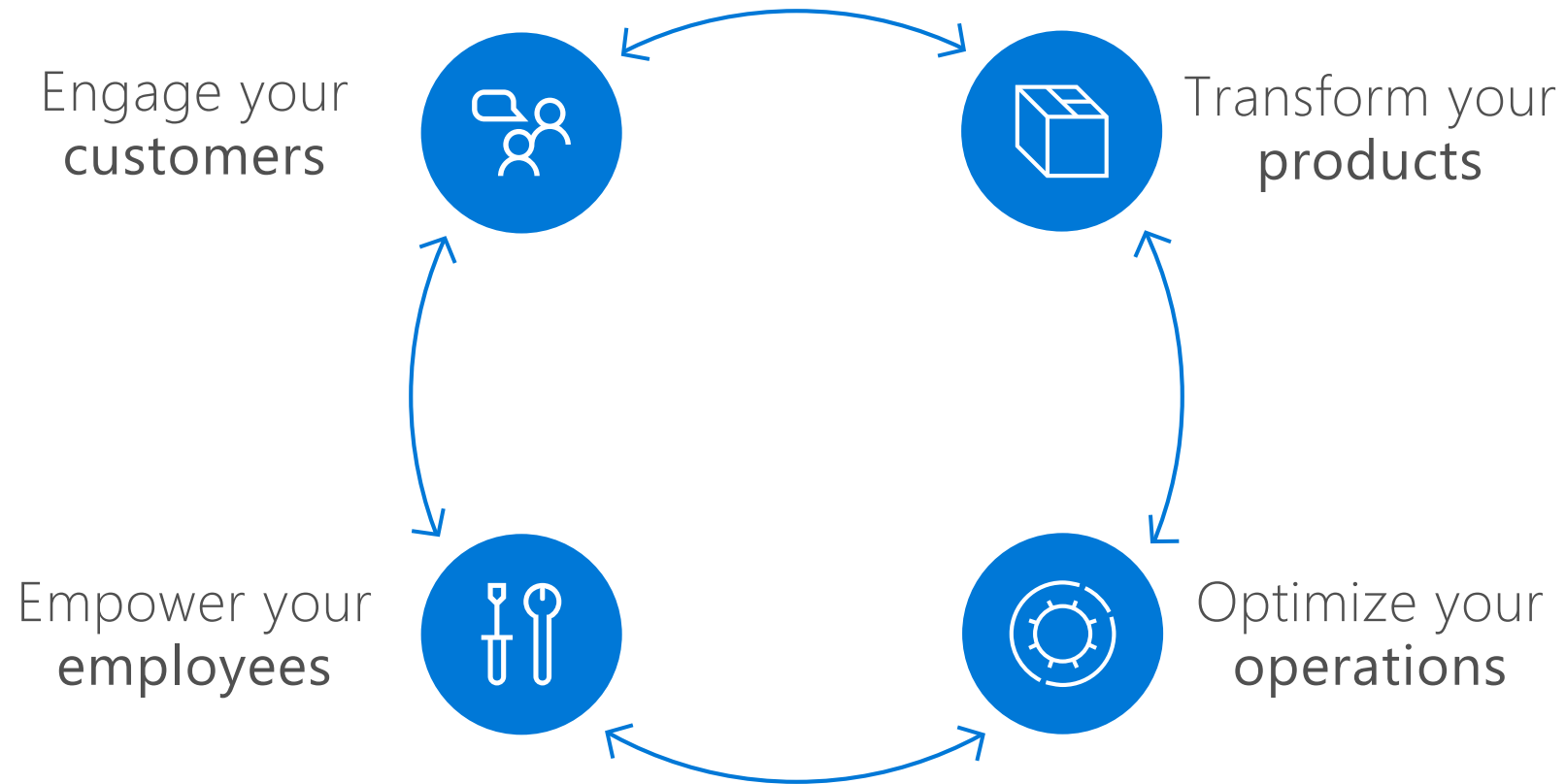


Industry Opportunity

SOURCE: McKinsey Global Institute analysis

- 1 Knowledge-intensive sectors that are highly digitized across most dimensions
- 2 Capital-intensive sectors with the potential to further digitize their physical assets
- 3 Service sectors with long tail of small firms having room to digitize customer transactions
- 4 B2B sectors with the potential to digitally engage and interact with their customers
- 5 Labor-intensive sectors with the potential to provide digital tools to their workforce
- 6 Quasi-public and/or highly localized sectors that lag across most dimensions

Digital Transformation





Engage your
customers

- Harness data for a complete customer view
- Draw actionable insights
- Deliver personalized, differentiated experiences



Empower your
employees



Optimize your
operations



Transform your
products



Engage your
customers



Empower your
employees



Optimize your
operations



Transform your
products

- Protect your organization, data and people
- Create a productive workplace to embrace diverse workstyles, anywhere
- Provide insights to drive faster, better decisions



Engage your
customers



Empower your
employees



Optimize your
operations



Transform your
products

- Accelerate the responsiveness of your business
- Improve service levels and reduce costs
- Anticipate the future with intelligent processes



Engage your
customers



Empower your
employees



Optimize your
operations



Transform your
products

- Utilize data to shift from hindsight to foresight
- Disrupt with new business models, products & services
- Differentiate & capture new revenue opportunities

FLEXIBLE

Built with what you know
Bridge between cloud & on
premises
Work with any device, app, data, OS

INTEGRATED

Built for—and open to—
extensibility
325,500+ partners &
millions of developers
Platform, productivity &
business apps that work
together

TRUSTWORTHY

Setting & leading industry
compliance standards
People-centric security & privacy
Proactively fighting digital crimes
\$15B+ investment in cloud
infrastructure



THANK YOU.

