



Trends in Cloud Computing

Presented by: Cam Wayland – Director Channel Dynamics

cwayland@channeldynamics.com.au

@channelcam

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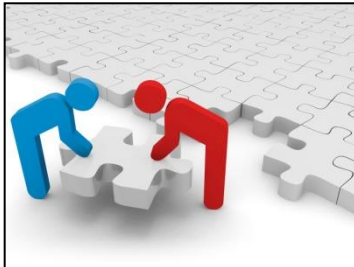
About Channel Dynamics



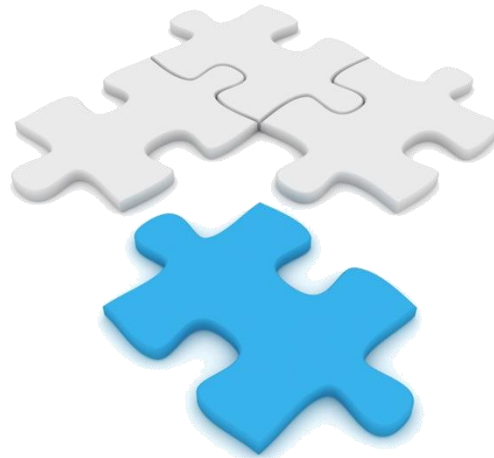
Channel
Training



Channel
Programs



Channel
Consulting



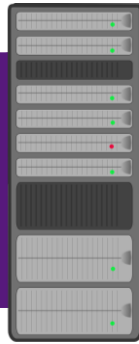
Today's Agenda:

- The End User Picture
- The Channel Opportunity
- Tips For Moving Forward



Three Eras of Enterprise Technology

Mainframe



Technology not widely accessible

Technology use highly restricted

Technology management highly centralized

PC/ Internet



Technology moderately accessible

Technology use becoming pervasive

Technology management mostly centralized

Cloud/ Mobile

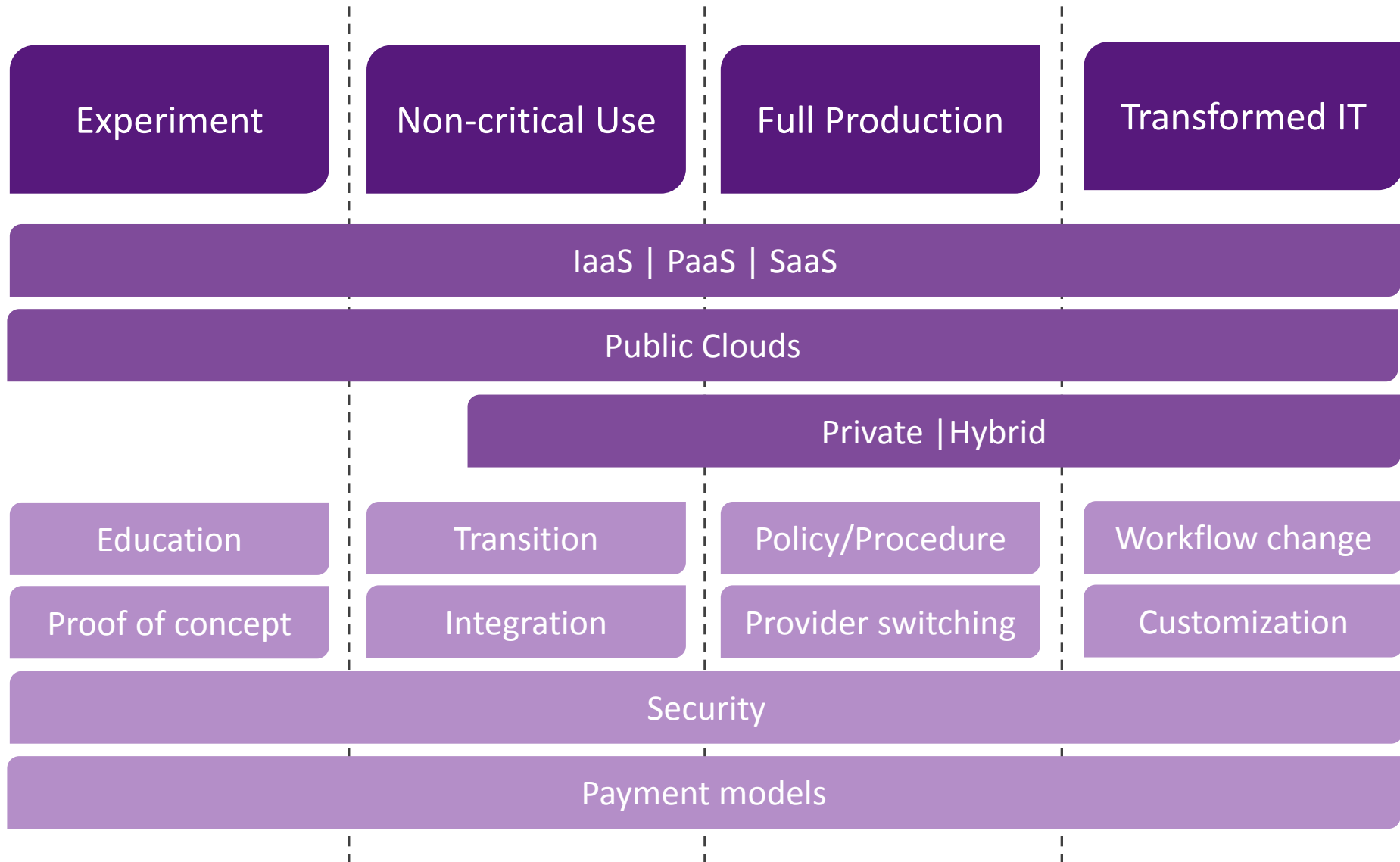


Technology widely accessible

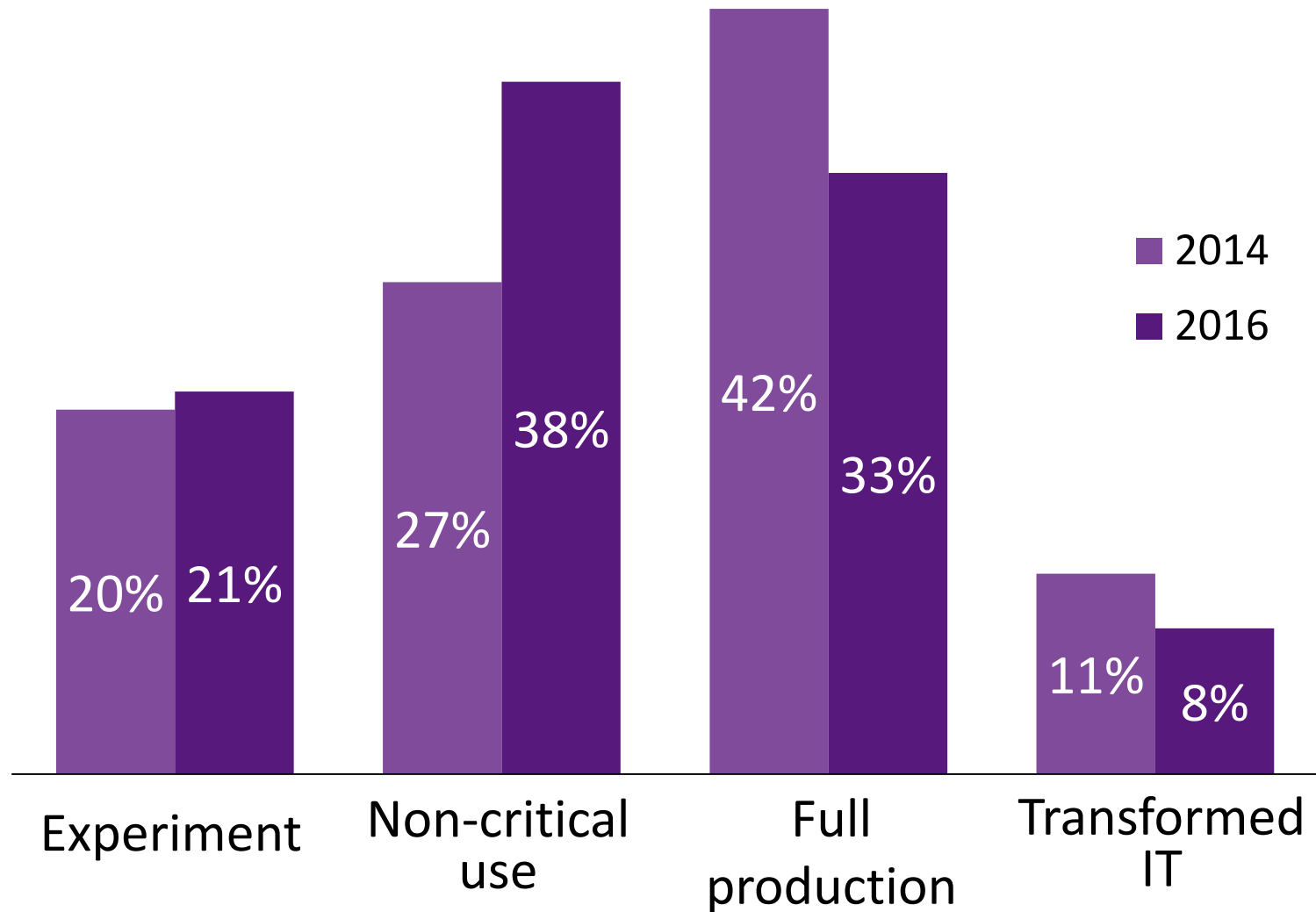
Technology use very open

Technology management decentralized

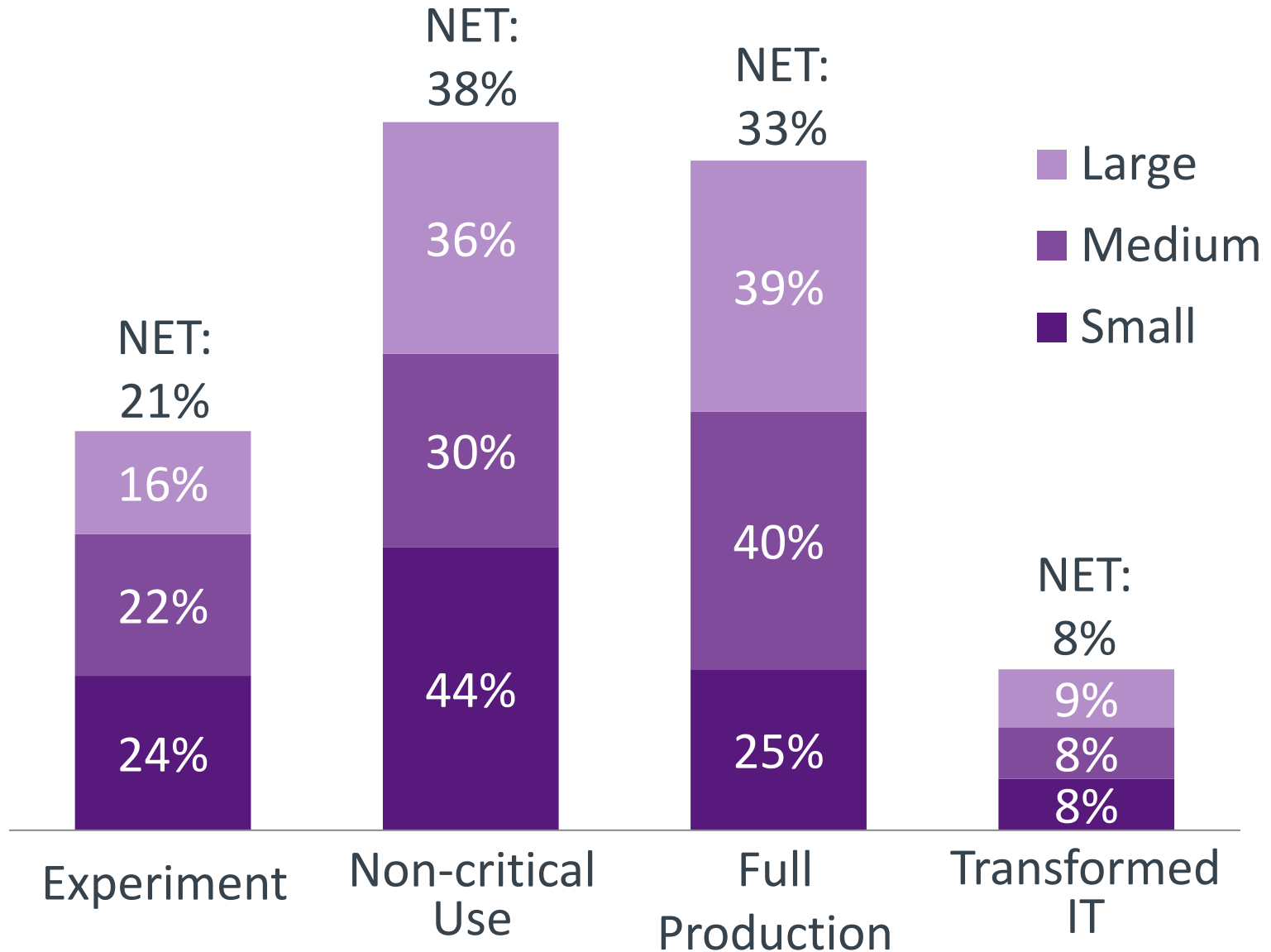
Cloud Adoption Progression



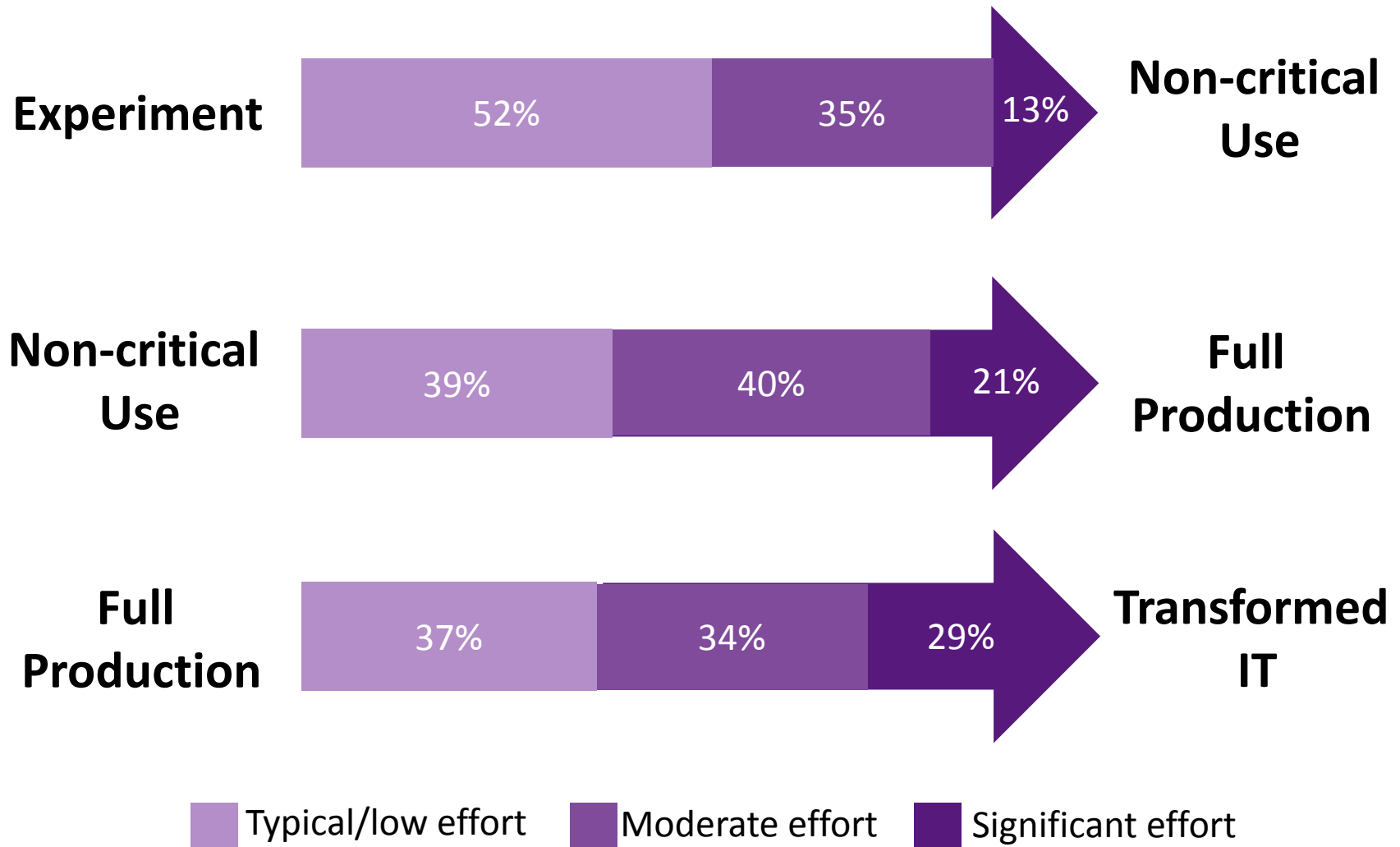
Refinement of cloud concepts making companies reassess their position



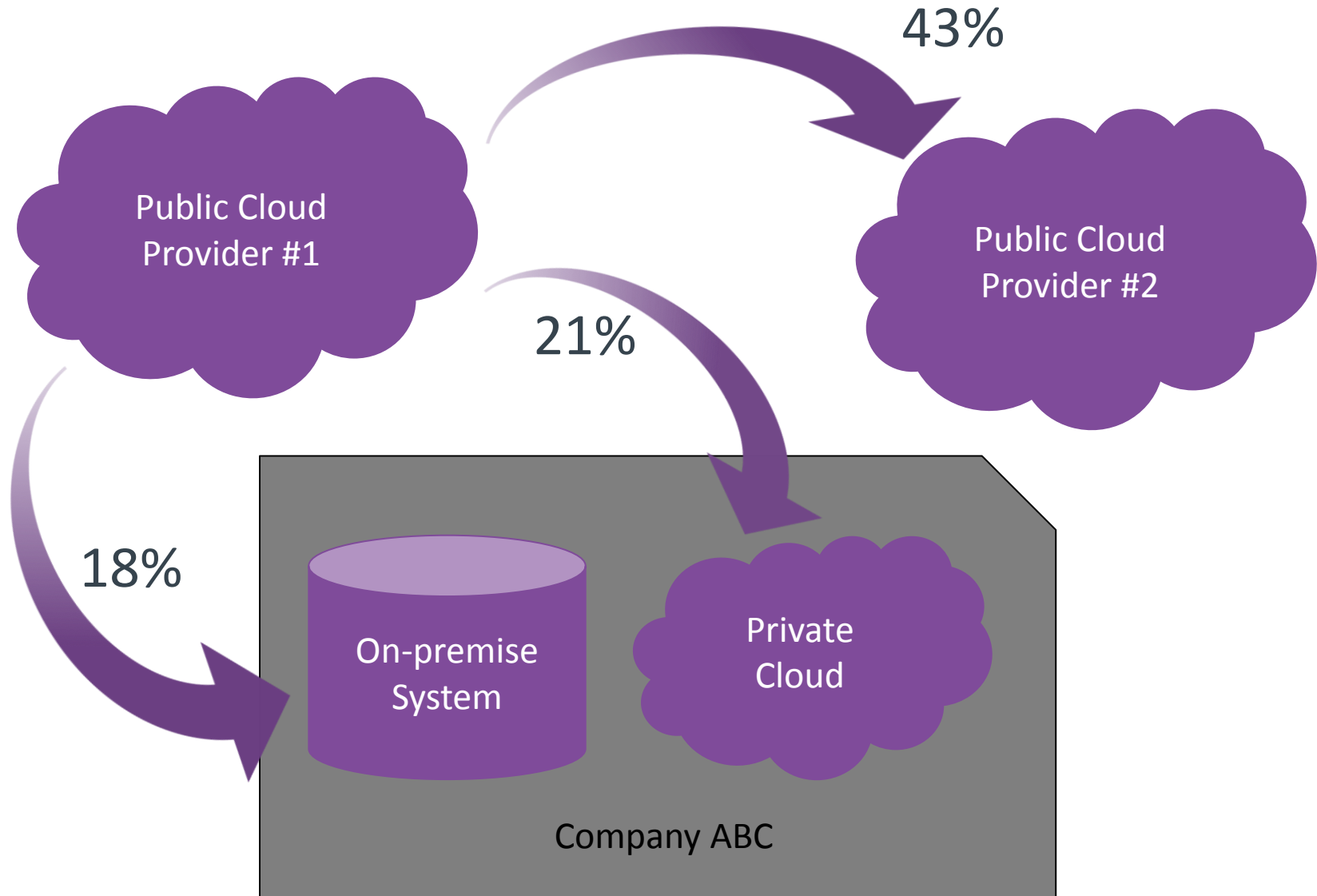
Adoption Progress by Company Size



Moving from Stage to Stage is a Big Challenge...



Companies Are Making Secondary Migrations



Reasons For Migration*

Between Public Clouds

- Better offering features 37%
- Security concerns 35%
- Cost 27%
- Desire for open standards 26%

Return To On Premise

- Security 58%
- Not achieving cost goals 30%
- Failure to integrate 24%
- Reliability dissatisfaction 22%

*Does not indicate wholesale move from one model to another

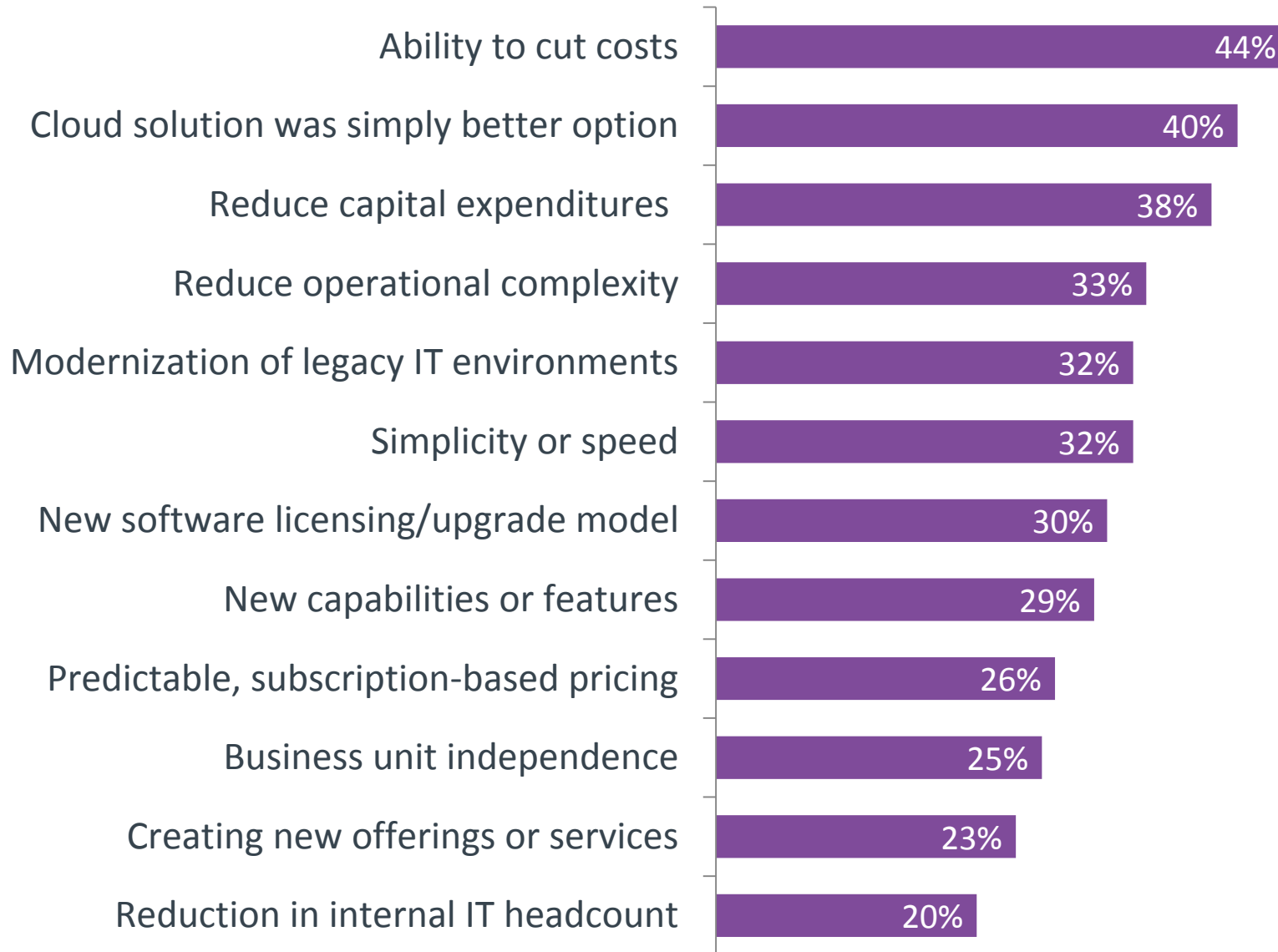
Application Usage Becomes Clearer

- Early cloud usage driven by developers
- Availability & maturity of SaaS applications driving current usage
- Analytics/BI use has dropped due to reality of data management practices, expected to increase again in future
- VoIP cloud usage driven by cost reduction
- VoIP highlights key challenge for most cloud migrations being need for network upgrade (42%)

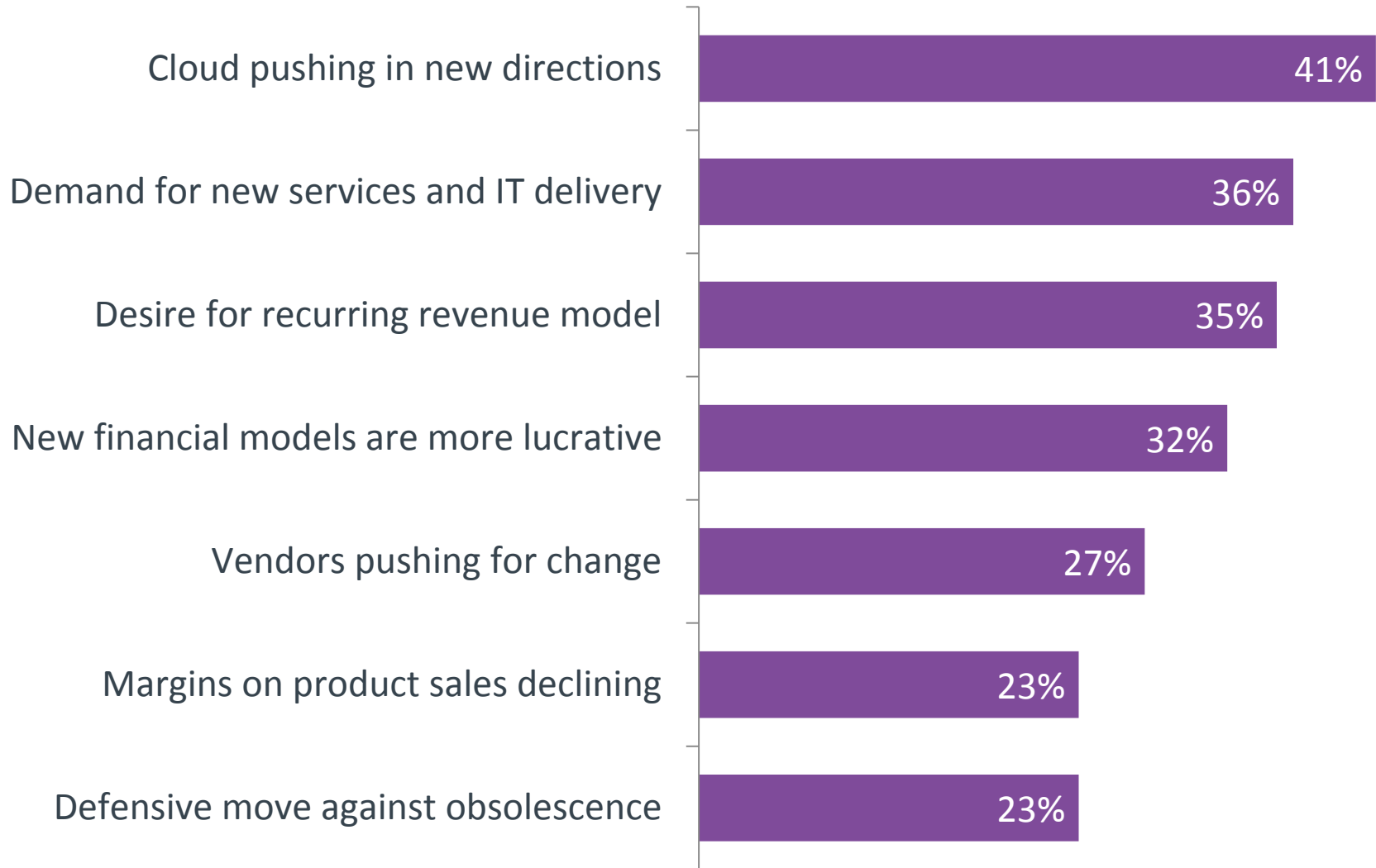
	Application Locations	
	Cloud	On-premise
Email	51%	47%
Web presence	46%	39%
Business productivity	45%	46%
Collaboration	39%	36%
CRM	37%	33%
Analytics/BI	35%	40%
Financial management	32%	60%
VoIP	31%	41%
Virtual desktop	30%	38%
HR management	29%	45%
Help desk	29%	40%
Expense management	29%	41%
ERP	26%	34%
Call Center	23%	39%

Source: CompTIA's *Trends in Cloud Computing* | Base: 495 U.S. firms with cloud adoption

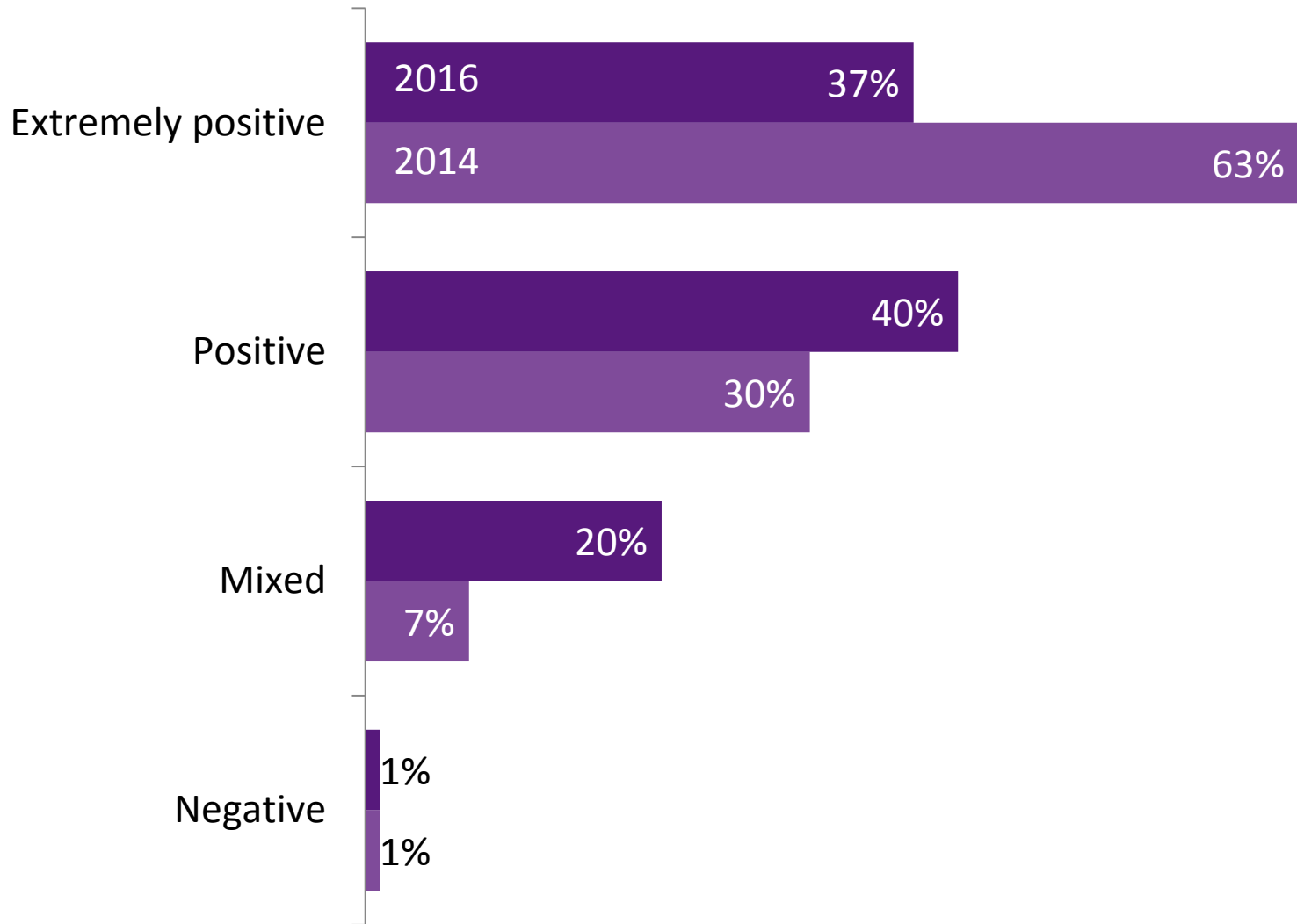
Companies Still Find Many Benefits



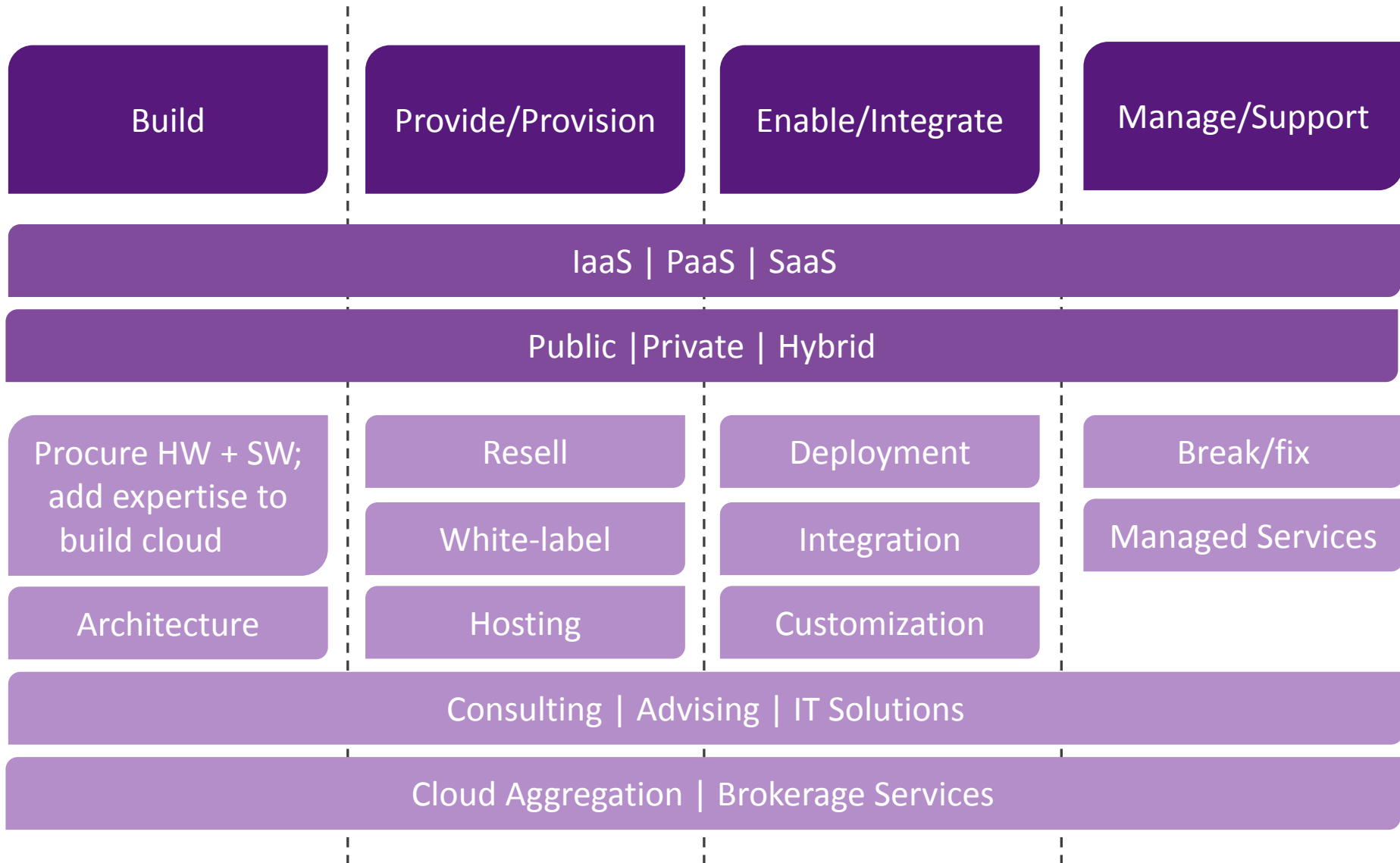
Primary Catalysts for Channel Transformation



Shifting Views on Cloud's Channel Impact

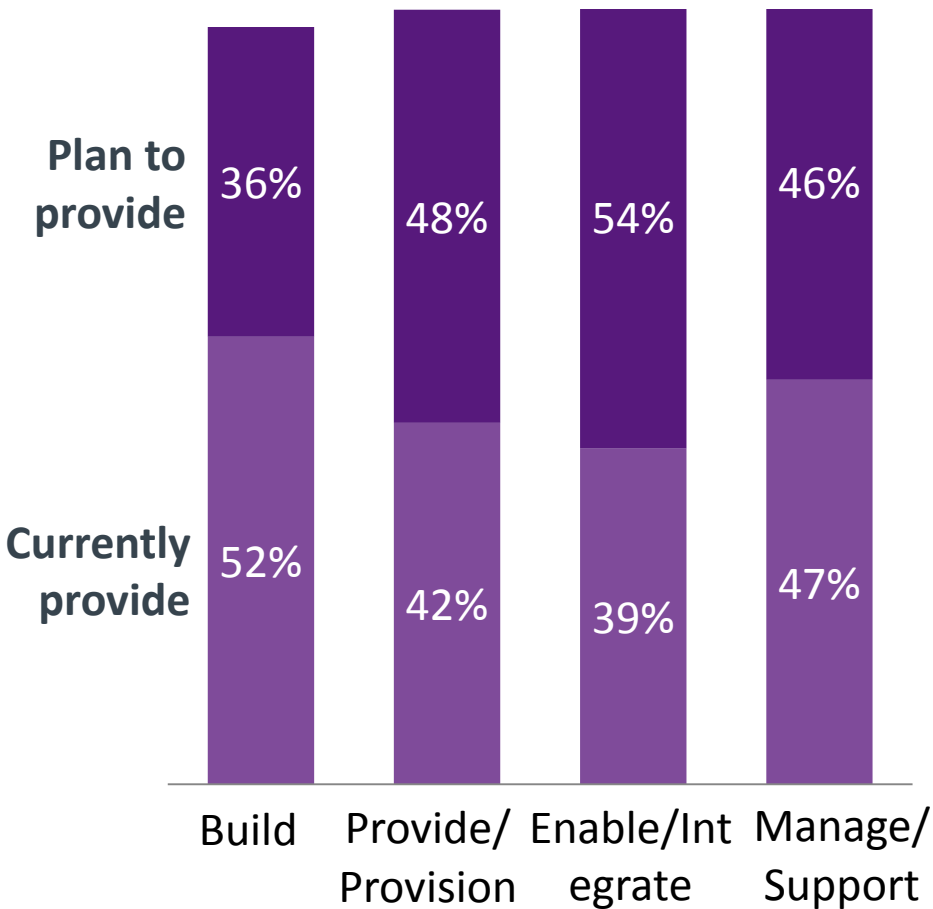


Channel Cloud Business Models

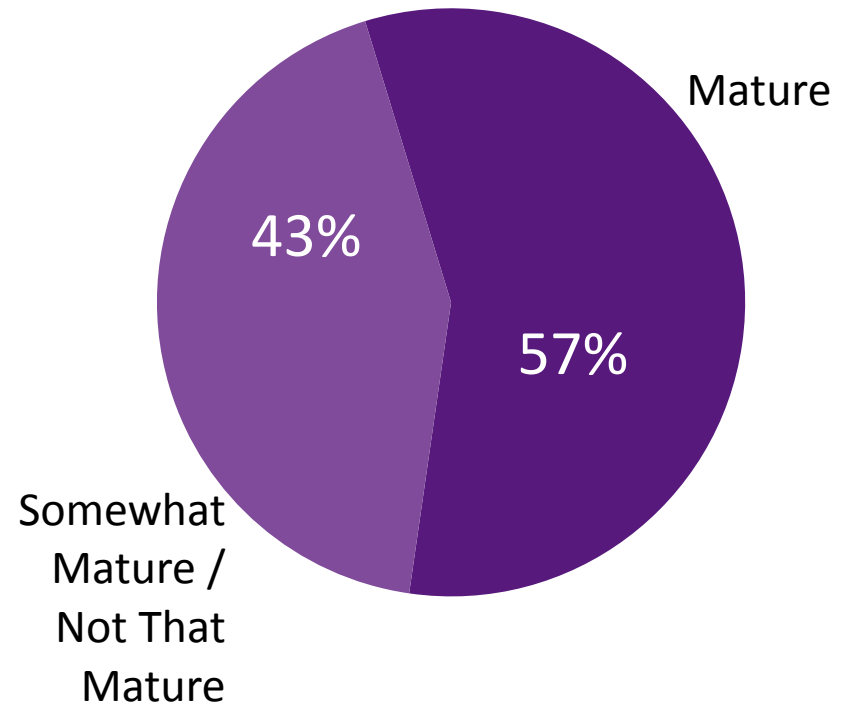


Business Model Adoption

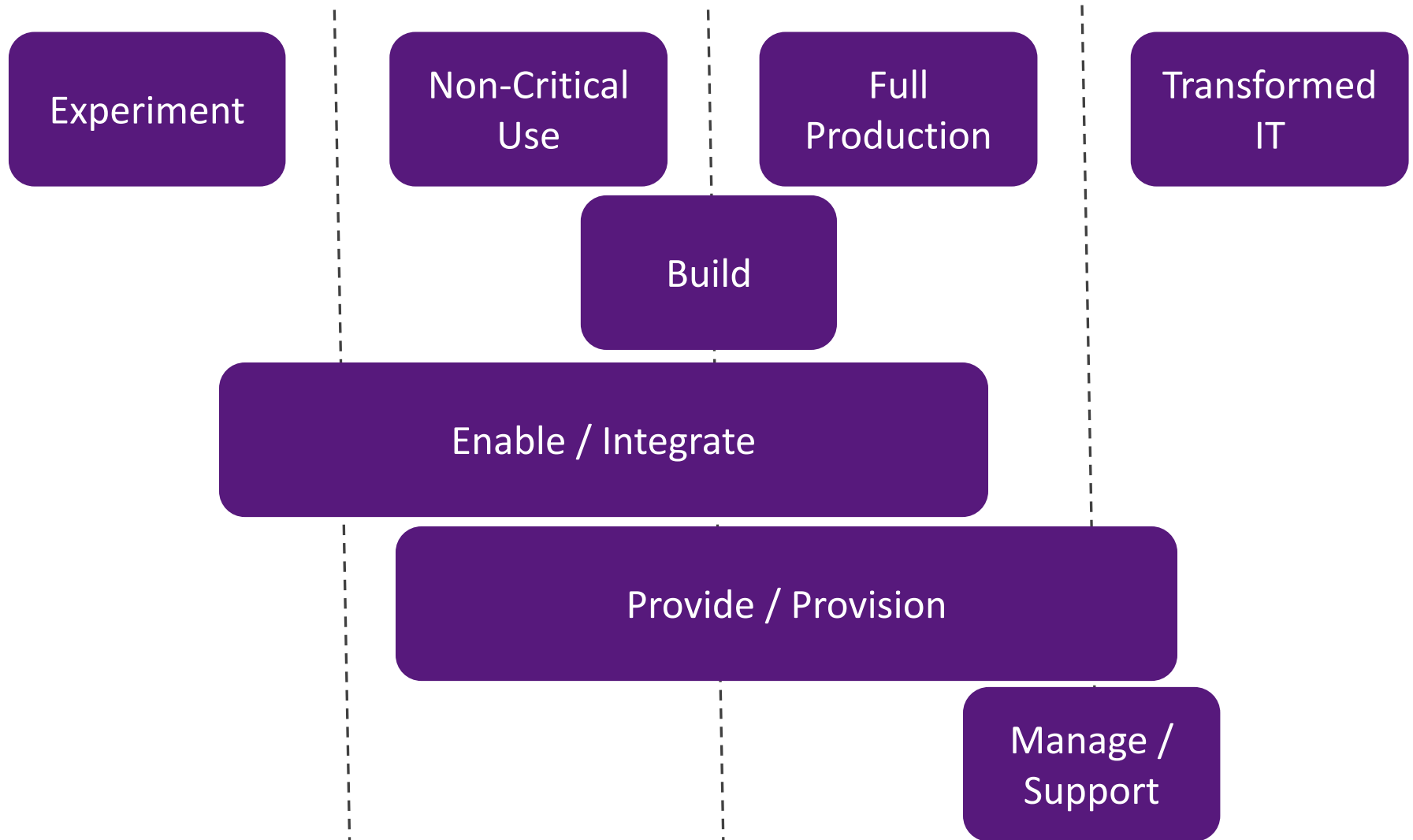
Cloud Business Model Involvement



Cloud Business Model Maturity Self-Assessment

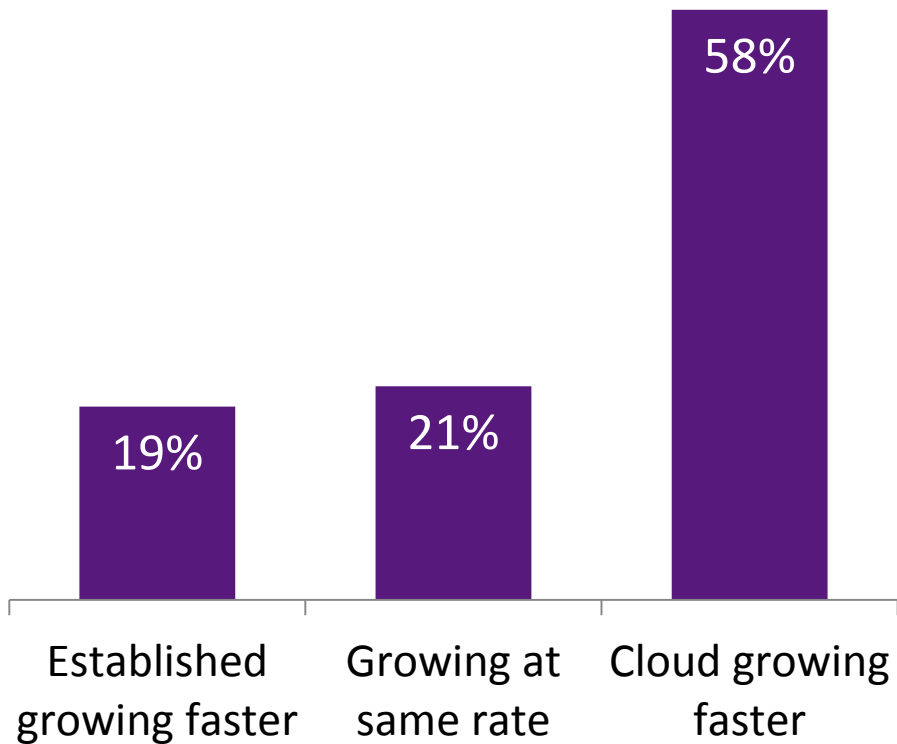


Meeting Needs at Different Adoption Stages

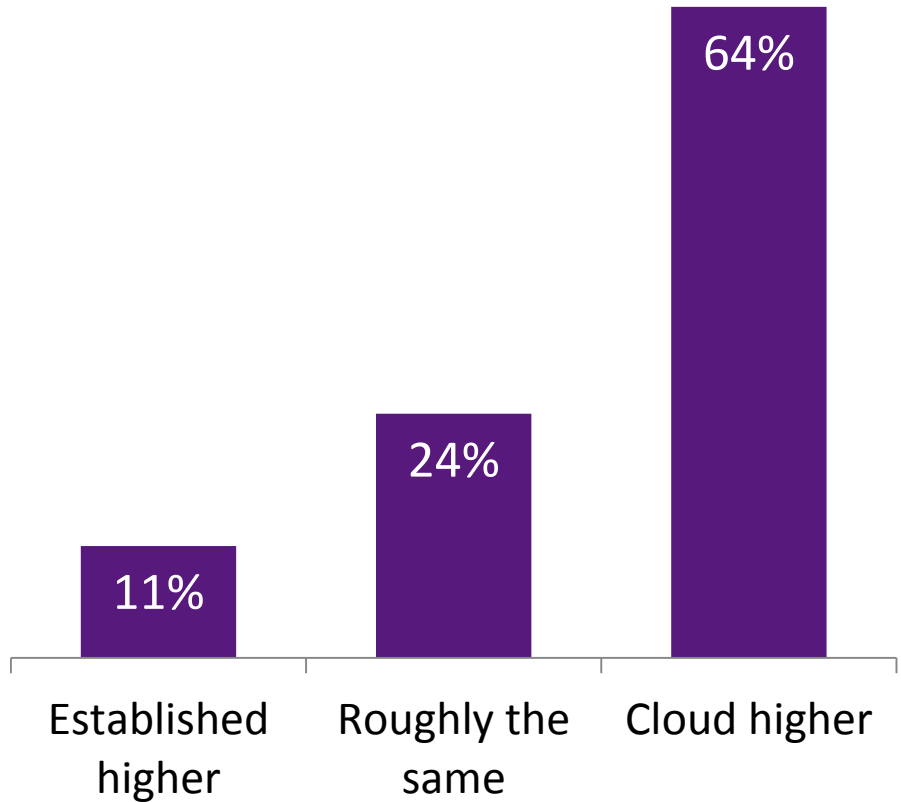


Channel Seeing Positive Cloud Momentum

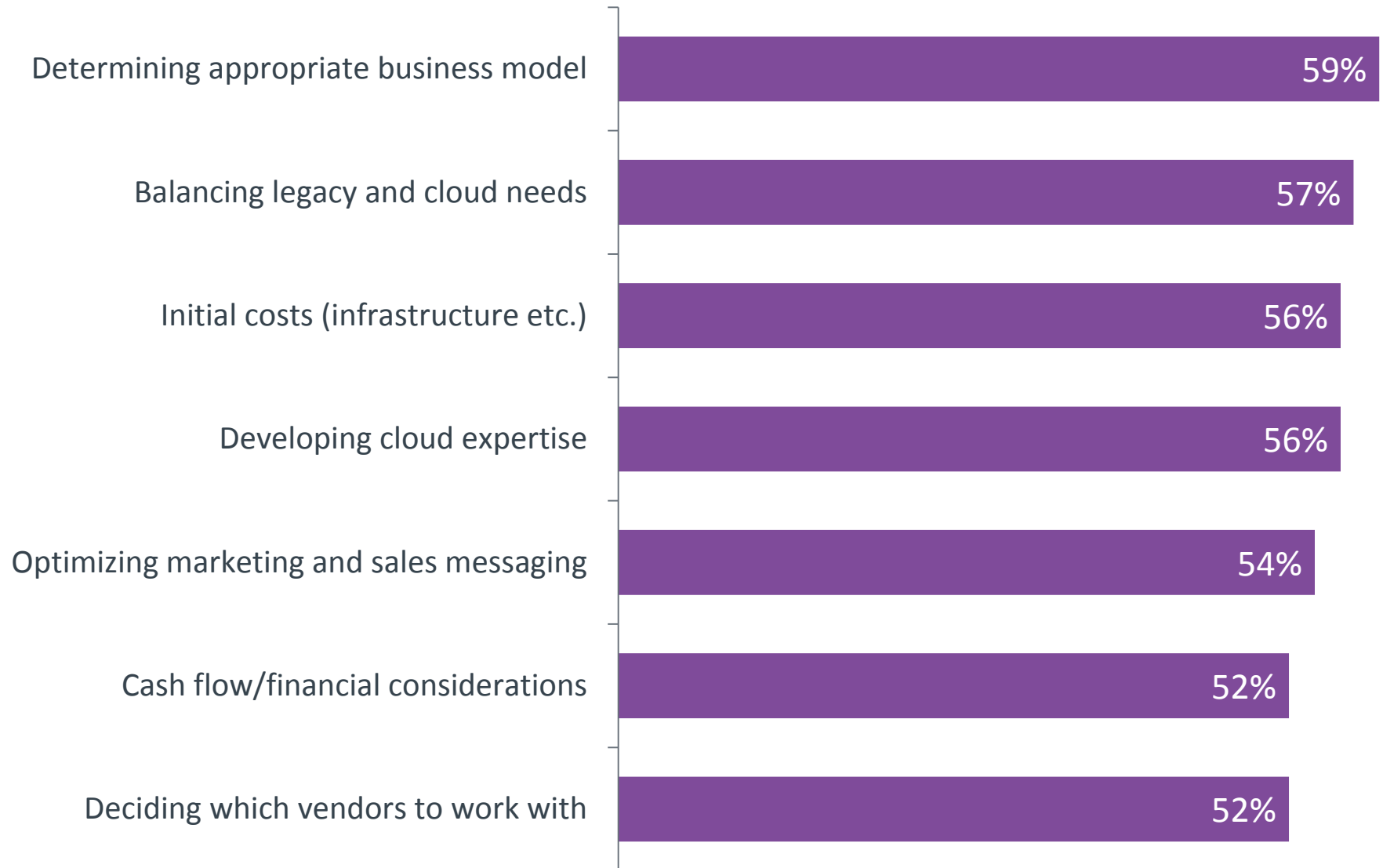
Cloud vs. Established
Products/Services Revenue Growth



Cloud vs. Established
Products/Services Profit Margins



Many Challenges Remain for Cloud In the Channel



Getting Started/Moving Forward

1. Invest in technical, sales and business training
2. Transition just a portion of business to cloud; scale later
3. Consider third-party data center rather than own NOC
4. Access vendor-provided training
5. Hire new sales reps to sell cloud services
6. Partner with other firms to combine skill sets
7. Pursue additional credit/capital



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