

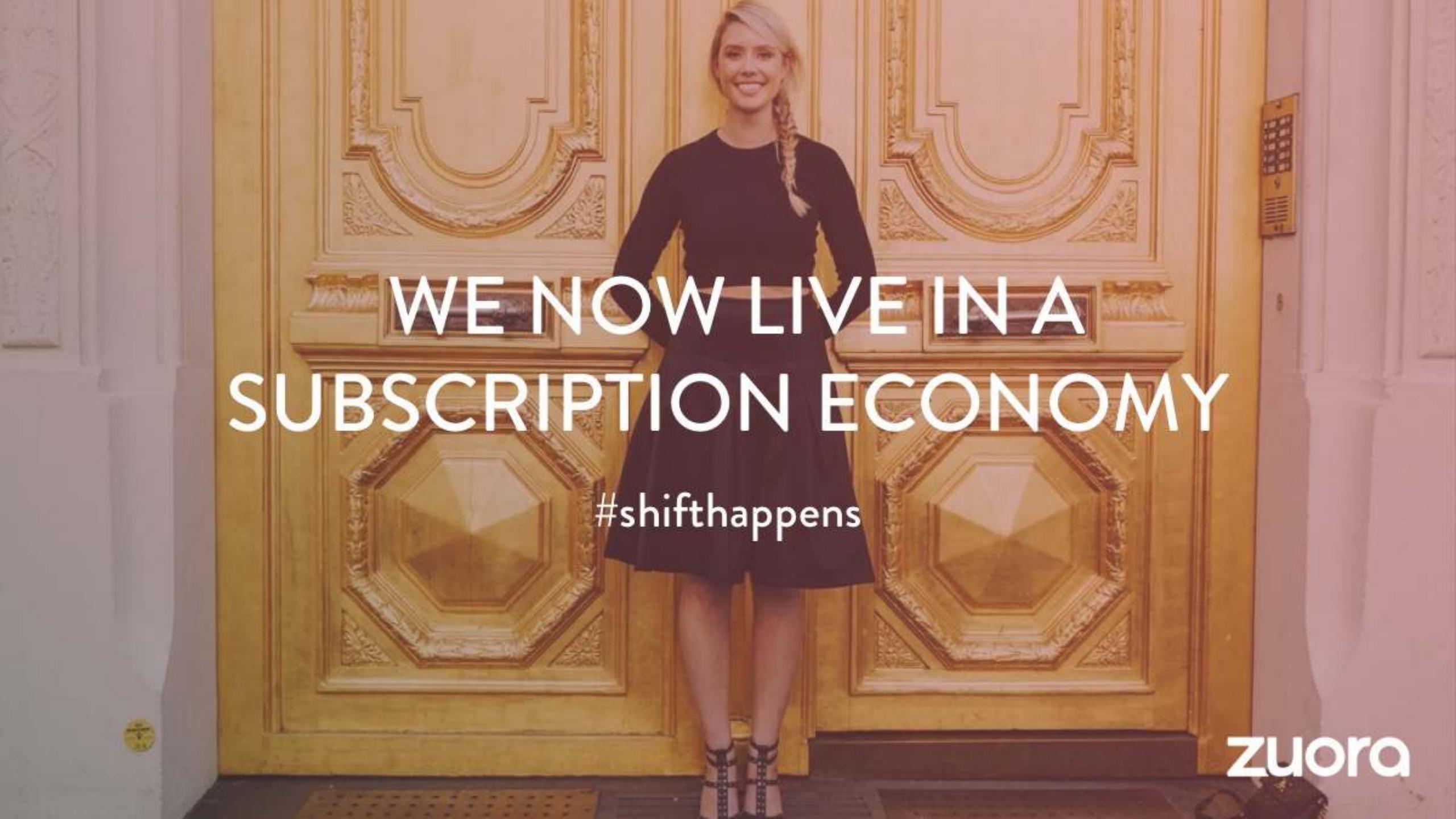


TURNING CUSTOMERS INTO SUBSCRIBERS

Tien Tzuo

CEO & Founder, Zuora

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WE NOW LIVE IN A
SUBSCRIPTION ECONOMY

#shifthappens

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A SHIFT FROM PRODUCTS TO RELATIONSHIPS

Products → Product + Services → Customer Centric → Relationship Centric

1970s 1990s 2000s Today

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THE WAY PEOPLE BUY HAS CHANGED FOR GOOD

We have new expectations

OUTCOMES

Not Ownership

CUSTOMIZATION

Not Generalization

CONSTANT IMPROVEMENT

Not Planned Obsolescence

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A GLOBAL PHENOMENON

80%

Of customers are
demanding new
consumption models

- *The Economist* 2014

50%

Of people in France are
moving away from
traditional ownership

- *Institut Français D'opinion
Publique (IFOP)*

80%

Of German companies
have dealt with the issue
of subscription
business models.

- *IDG Research Services*

\$420B

Spent on subscriptions
in the US in 2015; up
from \$215B in 2000.

- *Credit Suisse*

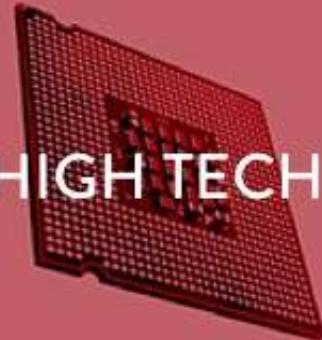
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EVERY INDUSTRY IS SHIFTING

Leaders are creating new experiences through a new kind of business model



CONSUMER
GOODS



HIGH TECH



EDUCATION



CLOUD SERVICES



HEALTHCARE



IOT



MEDIA



COMMUNICATION



THE BEST COMPANIES HAVE
REINVENTED THEMSELVES—AWAY
FROM PRODUCTS

#allaboutrelationships

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IN THE LAST 15 YEARS, 52% OF THE FORTUNE 500 COMPANIES HAVE DISAPPEARED

1955

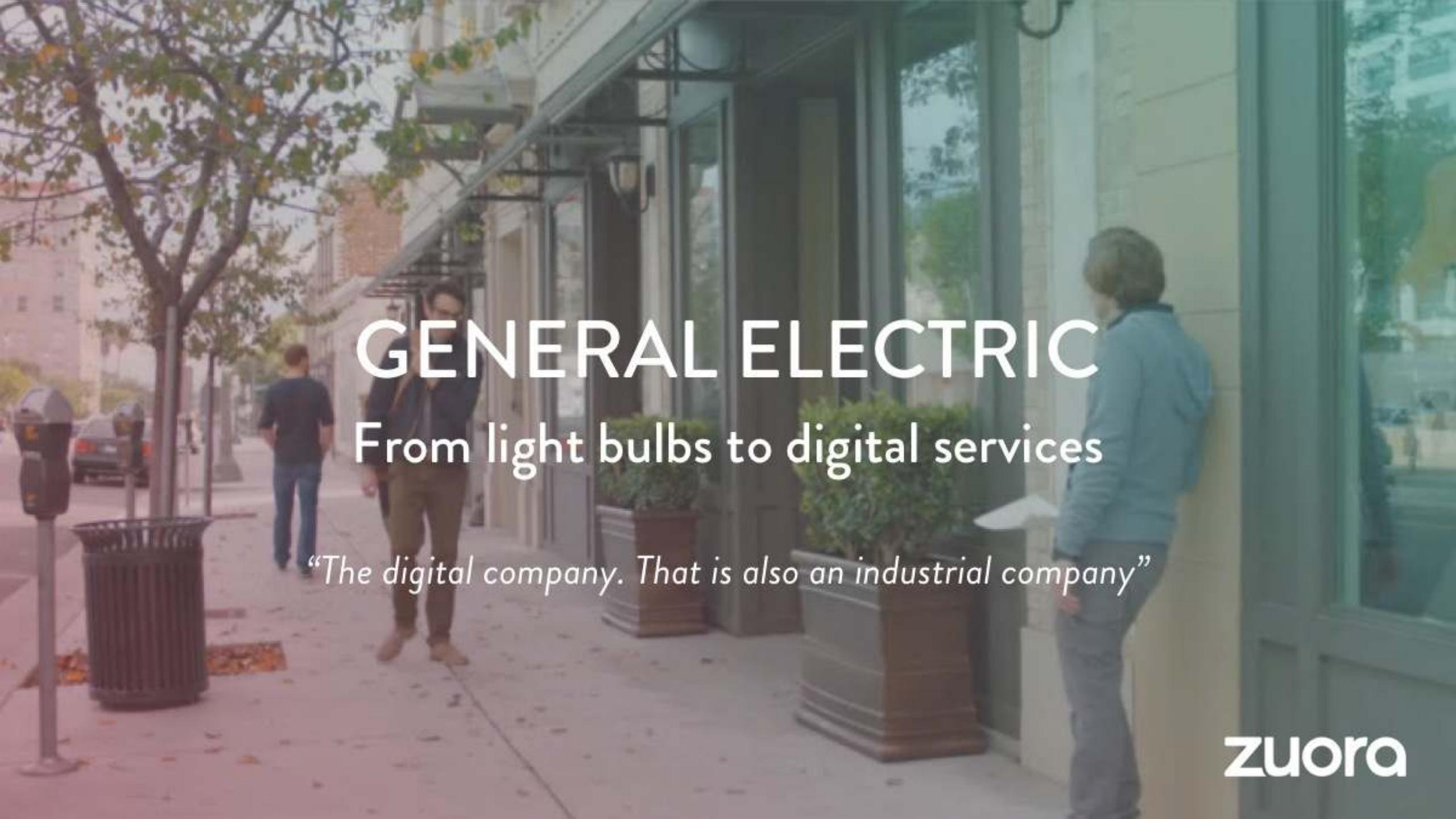
vs.

2015

Average life expectancy 75 years

Average life expectancy 15 years

WHO SURVIVED THE MASS EXTINCTION?

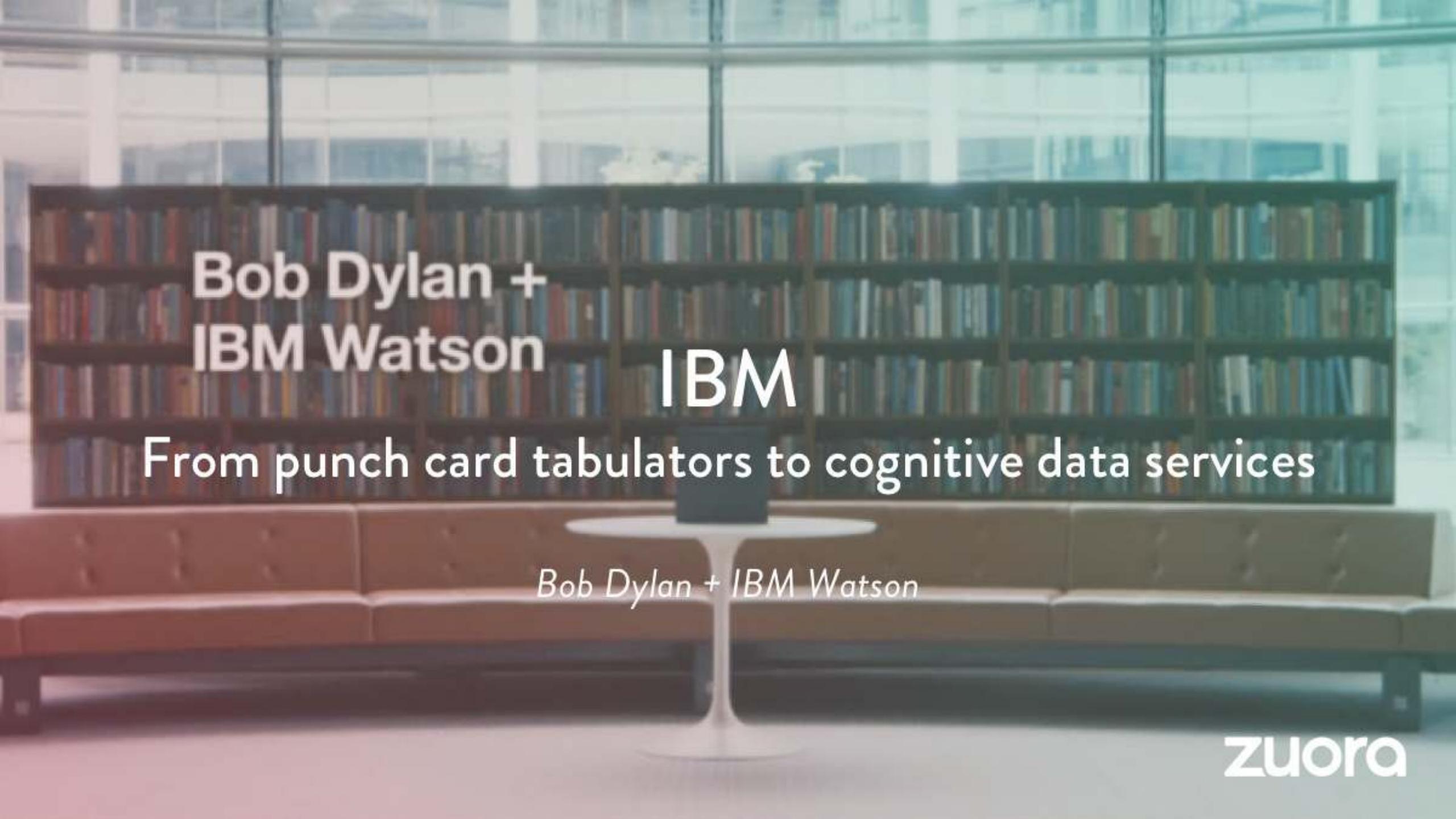
A photograph of a city street scene. In the foreground, a man in a dark t-shirt and jeans walks away from the camera. A woman in a brown coat and dark pants follows him. To the right, another man in a teal shirt and jeans stands near the entrance of a building with large windows. The sidewalk is lined with trees and a parking meter. A trash can is on the left. The scene is set in a sunny, urban environment.

GENERAL ELECTRIC

From light bulbs to digital services

“The digital company. That is also an industrial company”

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Bob Dylan +
IBM Watson

IBM

From punch card tabulators to cognitive data services

Bob Dylan + IBM Watson

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OUR
BLADES
ARE
F**KING
GREAT

UNILEVER

Buys Dollar Shave Club for \$1 billion to challenge P&G

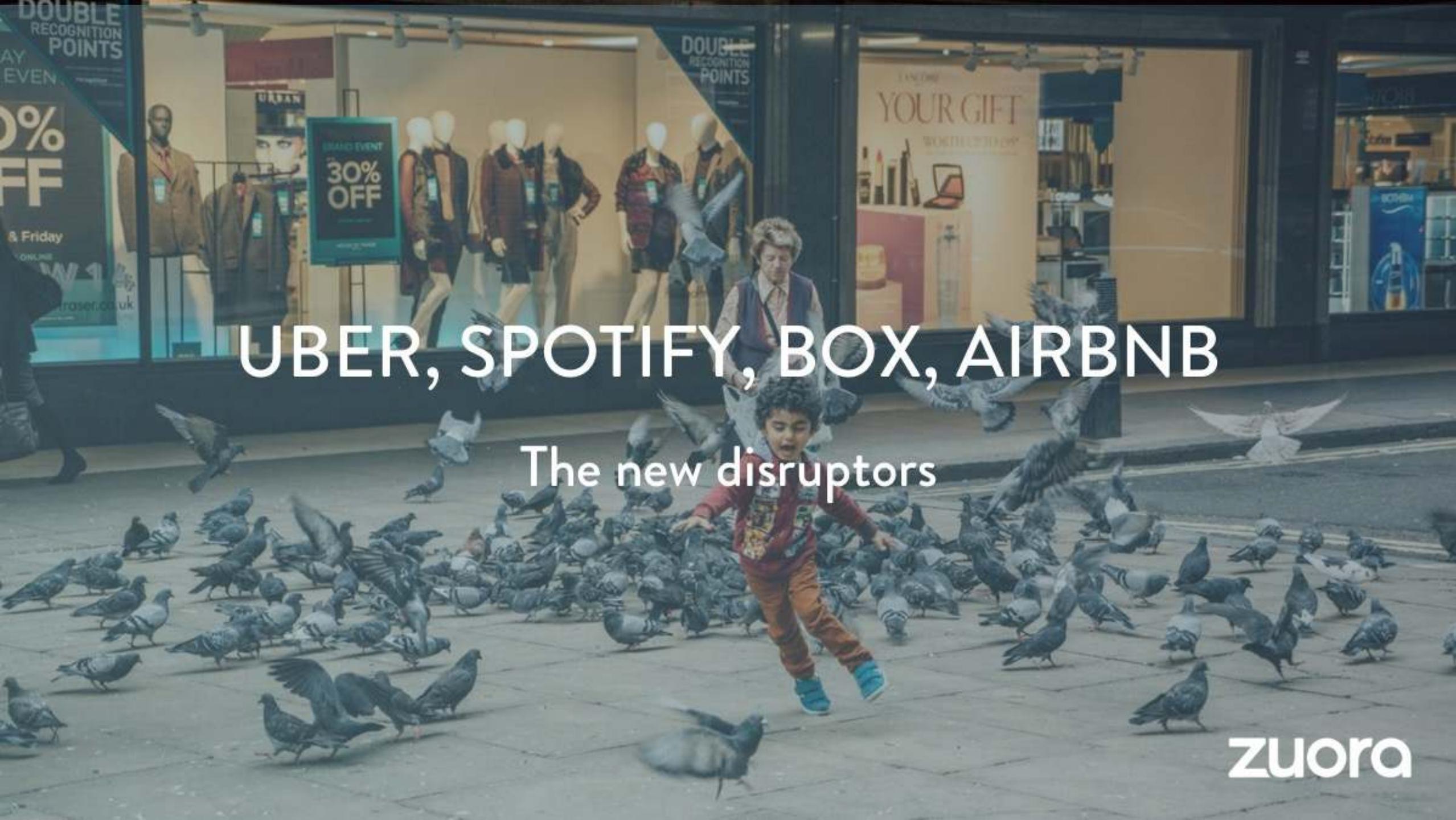
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A photograph of two men in an office environment. They are both wearing casual button-down shirts and jeans, and are seated in office chairs, each holding a coffee cup. They are both laughing heartily, with their heads tilted back and eyes closed. The background shows office equipment and a window with a view of the outside.

AMAZON, GOOGLE,
APPLE, FACEBOOK, SALESFORCE

The relationship-makers

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UBER, SPOTIFY, BOX, AIRBNB

The new disruptors

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WHAT IS THE COMMON THREAD?

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THEY UNDERSTAND WE WANT THE SUBSCRIPTION EXPERIENCE



Ongoing
Value



Memorable
Experiences



On-demand
Fulfillment



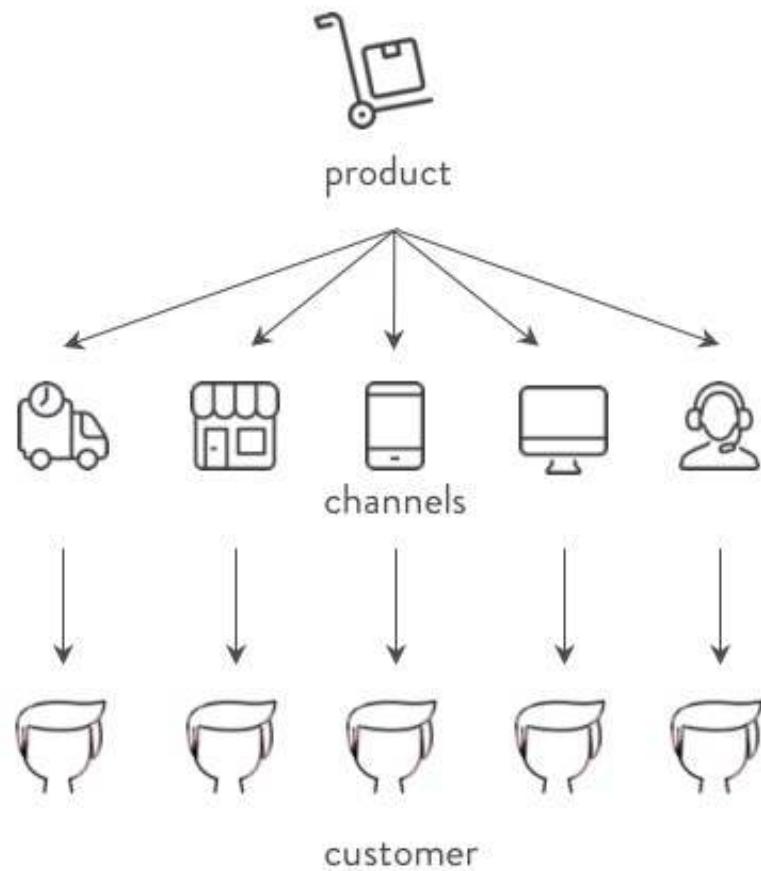
Anywhere,
Real-time



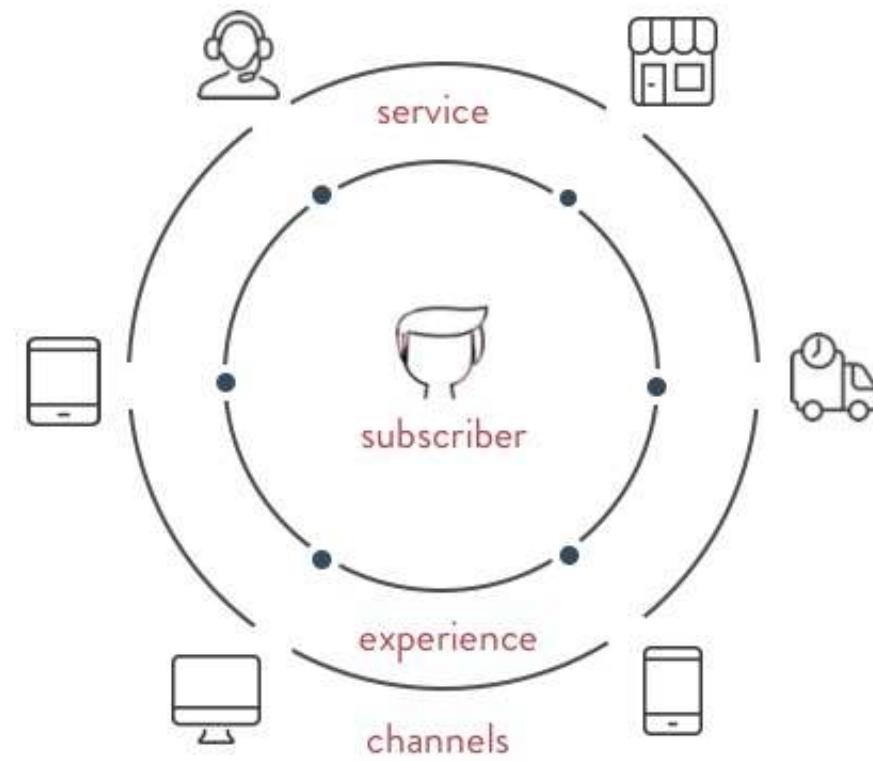
Personalized
Service

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IT'S A NEW WAY OF THINKING

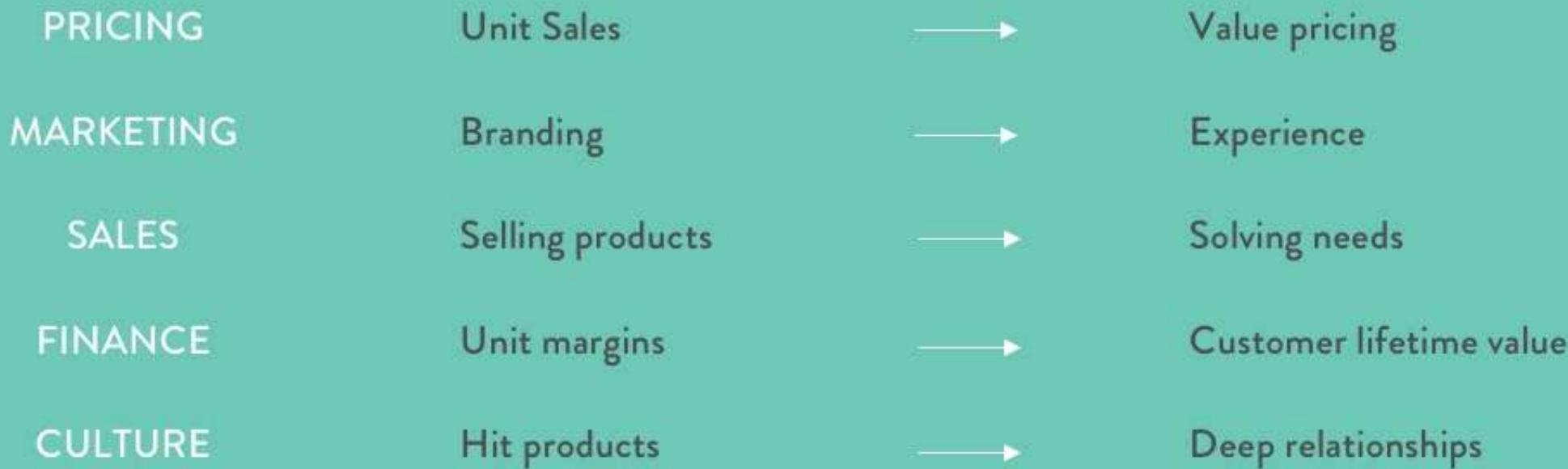


VS.



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THIS CHANGES EVERYTHING



SUBSCRIBER IDENTITY

Demographic data

Behavioral data

Financial data

#beyondCRM

Old world:

TRADITIONAL RECORD

Name	Phone
Email	Company
Twitter	Facebook

New world:

SUBSCRIBER IDENTITY RECORD

Purchases	Payment history	Customer Moments
Products	Refund history	Usage metrics
Local Pricing	Lifetime Value	Add-Ons
Promotions	Renewal Value	
Adjustments	Aging balance	

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THAT'S WHY WE BUILT ZUORA

A unified solution for the Subscription Economy

Subscriber Management

- Cross-sells
- Upsells
- Renewals
- 360 Sync

Pricing & Packaging

- Pricing
- Bundling
- Entitlements

Billing

- Rating
- Taxation
- Billing
- Collections

Payments

- Credits
- Adjustments
- Online Payments
- Offline Payments

Quoting

- Configuration
- Guided Selling
- Rules Engine

Revenue

- GL Integration
- Revenue Recognition
- Accounting Close
- Roll-Up

Analytics

- Dashboards
- Sub. Identity
- Report Builder
- Segmentation
- Triggers

Platform

- Integration
- Scalability
- Reliability
- Security
- Compliance
- Extensibility

#happybusiness

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"There was a pre-Zuora Box and a post-Zuora Box. It was really painful before you guys came along."

— Aaron Levie, CEO

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“Zuora has given us more presence on the global stage to be able to sell to more markets, to more people. ”

– *John O'Donovan, CTO*

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“Zuora is helping us to achieve our ultimate goal: to improve the environments where people live and work, while dramatically reducing the consumption of resources.”

– Cyril Perducat, EVP of Digital Services, IoT

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THE END

#startyourstory

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