



TURNING CUSTOMERS INTO SUBSCRIBERS

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A woman with blonde hair in a braid, wearing a black long-sleeved dress and black strappy heels, stands smiling in front of a large, ornate wooden door with gold-colored carvings. The image has a warm, slightly pinkish tint.

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

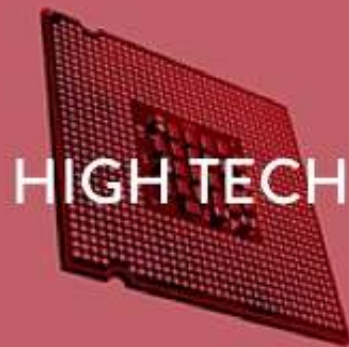
Spent on subscriptions
in the US in 2015; up
from \$215B in 2000.

- Credit Suisse

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EVERY INDUSTRY IS SHIFTING

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





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

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WHO SURVIVED THE MASS EXTINCTION?

A city street scene with pedestrians and a building with large glass windows. The image has a teal and pink color overlay. The text 'GENERAL ELECTRIC' is centered in large white capital letters.

GENERAL ELECTRIC

From light bulbs to digital services

"The digital company. That is also an industrial company"

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The background of the slide is a photograph of a modern interior space. It features a long, low brown leather sofa in the foreground. Behind the sofa is a large, dark-colored bookshelf filled with many books. In front of the sofa, there is a small, round, white-topped table with a thin metal base, and a laptop is open on it. The room has large windows in the background, letting in natural light.

**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 sitting in white plastic chairs in what appears to be a cafe or office breakroom. They are both laughing heartily. The man on the left is wearing a light pink button-down shirt and blue jeans, holding a white coffee cup. The man on the right is wearing a blue and white checkered button-down shirt and blue jeans, also holding a white coffee cup. In the background, there is a wooden counter with various items like coffee bags and glassware. The image has a semi-transparent dark overlay with white text.

AMAZON, GOOGLE, APPLE, FACEBOOK, SALESFORCE

The relationship-makers

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A photograph of a young child in a red jacket and orange pants running through a large flock of pigeons on a city sidewalk. In the background, there is a retail store with large windows displaying mannequins and promotional signs. One sign says '30% OFF' and another says 'YOUR GIFT'. The scene is overlaid with white text.

UBER, SPOTIFY, BOX, AIRBNB

The new disruptors

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A high-angle, wide shot of a busy pedestrian plaza. The ground is paved with a geometric pattern of large, light-colored tiles forming a grid of squares and diamonds. Numerous people are walking across the plaza in various directions. Long, dark shadows are cast across the tiles, indicating the sun is low in the sky. The overall scene is one of a bustling public space.

WHAT IS THE COMMON THREAD?

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THEY UNDERSTAND WE WANT THE SUBSCRIPTION EXPERIENCE



Ongoing
Value



Memorable
Experiences



On-demand
Fulfillment



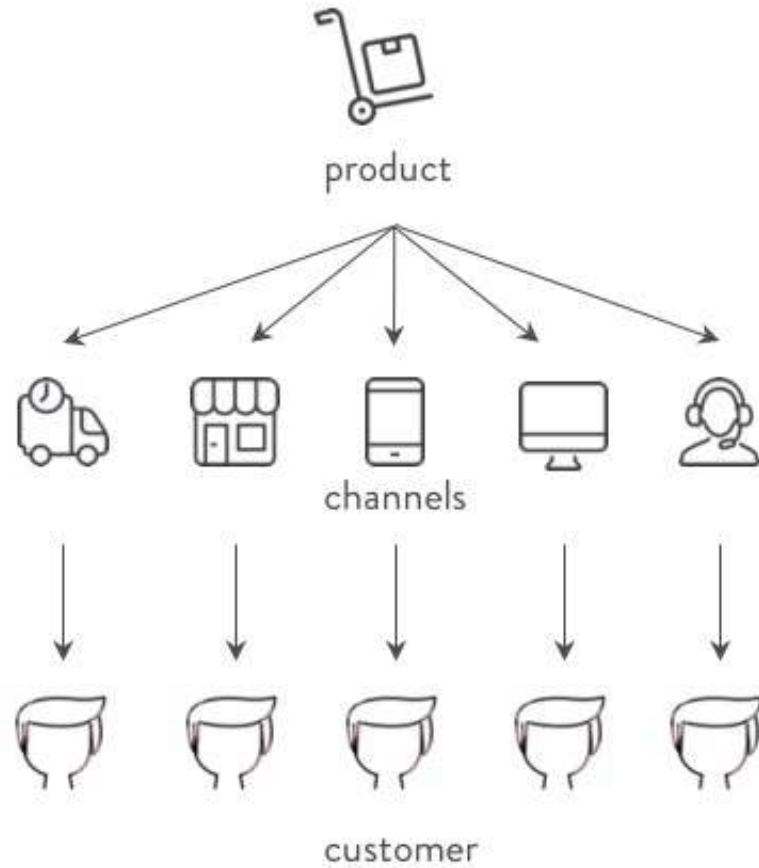
Anywhere,
Real-time



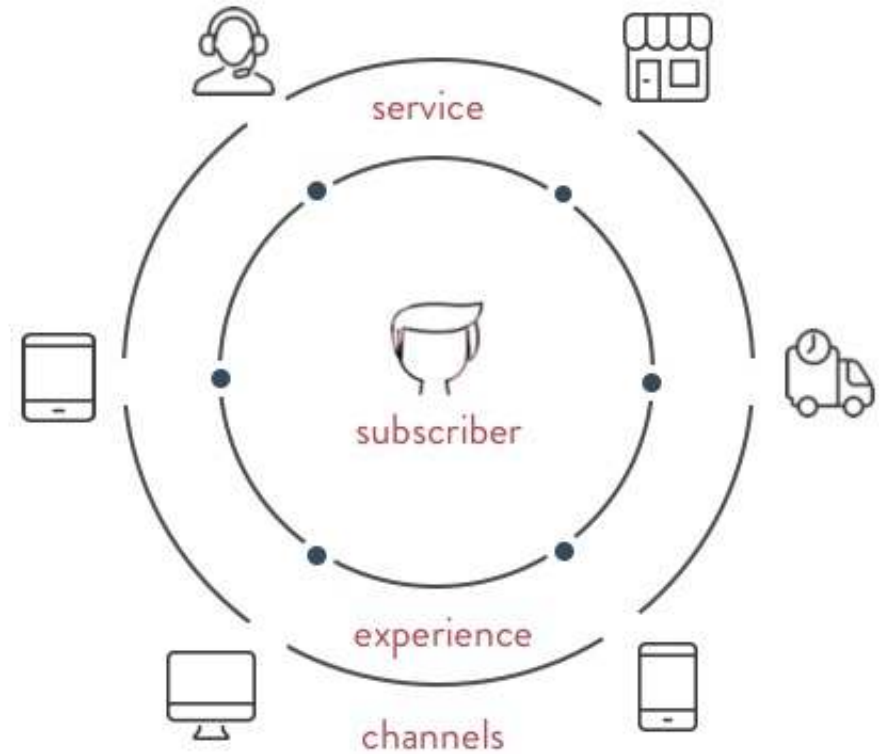
Personalized
Service

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IT'S A NEW WAY OF THINKING



VS.



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THIS CHANGES EVERYTHING

| | | | |
|-----------|------------------|---|-------------------------|
| PRICING | Unit Sales | → | Value pricing |
| MARKETING | Branding | → | Experience |
| SALES | Selling products | → | Solving needs |
| FINANCE | Unit margins | → | Customer lifetime value |
| CULTURE | Hit products | → | Deep relationships |

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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