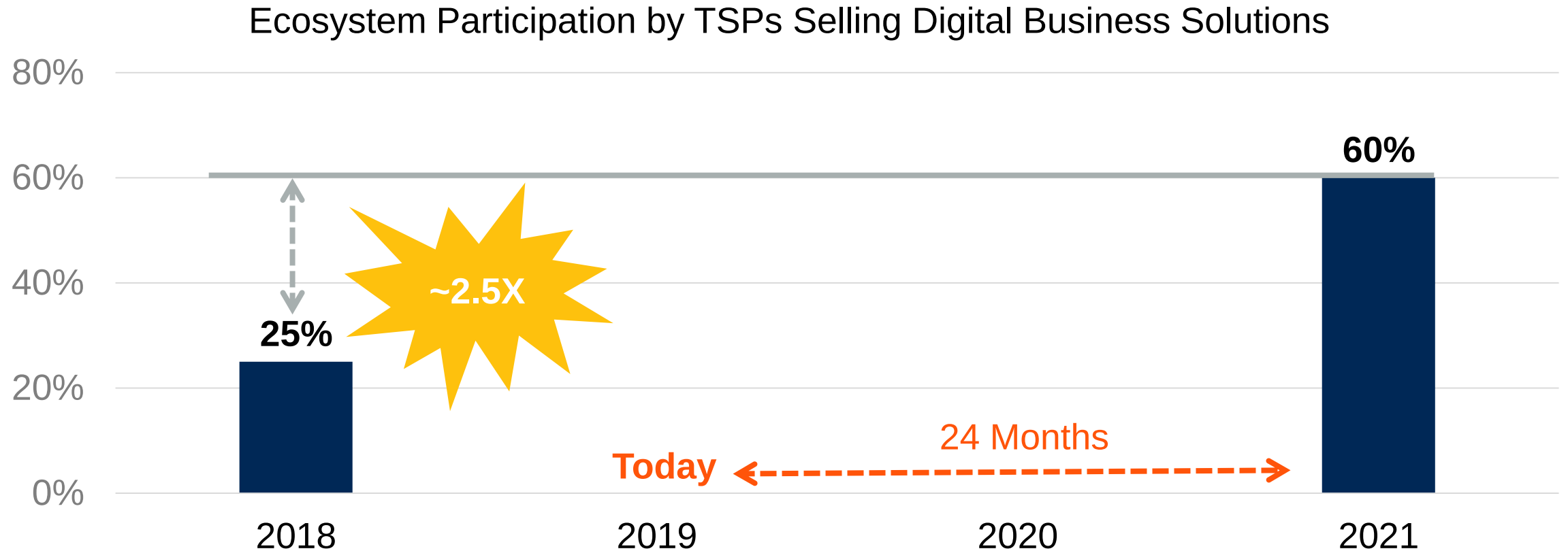


Unleash Your Digital Strategy & Drive Customer Centricity Through Ecosystems

TSP ecosystem participation for digital business solutions to grow to 60% in next few years



Partnerships are not new but scale and pace of innovation is driving participation

Drivers of ecosystems:

- TSPs often competing globally rather than locally
- Pace of technology innovation coupled with complexity – companies can't “go it alone”
- Need to go where customers are (customer at core of go-to-market)



Large vendors are battling for partnerships



We Want You!



Microsoft

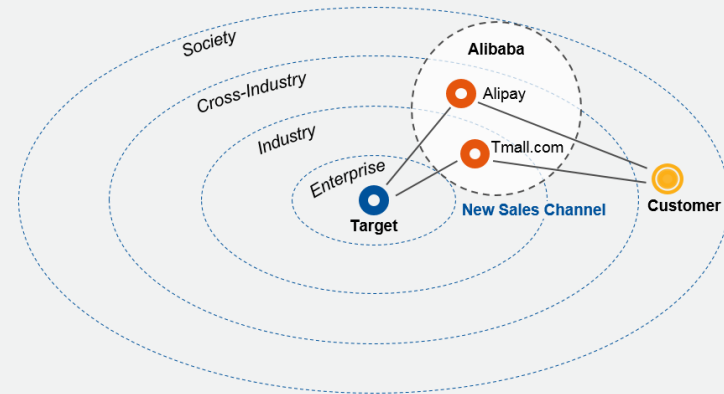


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There are many different types of ecosystems

1

Ecosystem That Accesses New Sales and Distribution Channels

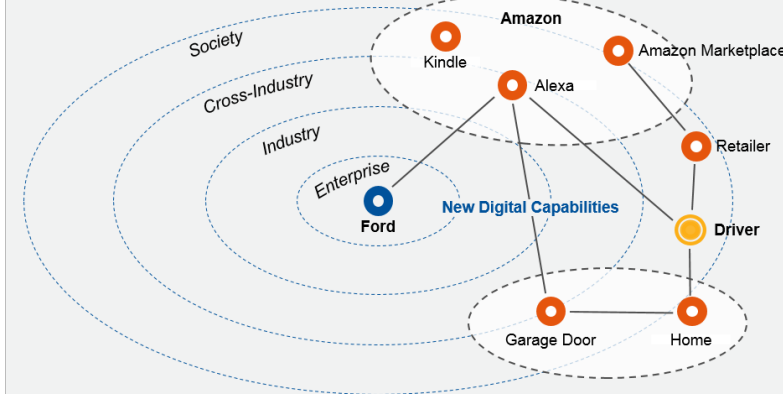


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2

Ecosystem Providing New Customer Interactions and Product Capabilities

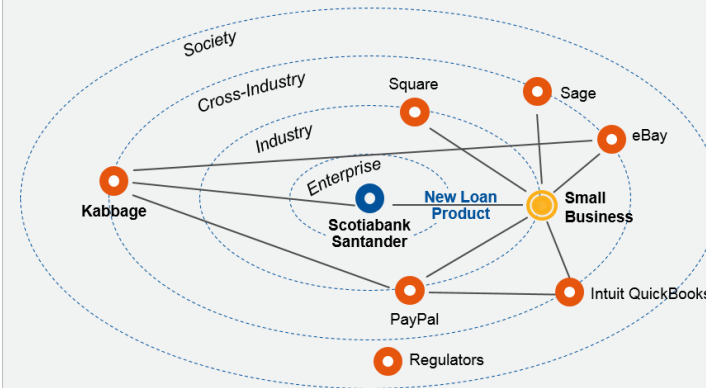


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3

Ecosystem That Extends or Creates Products and Services



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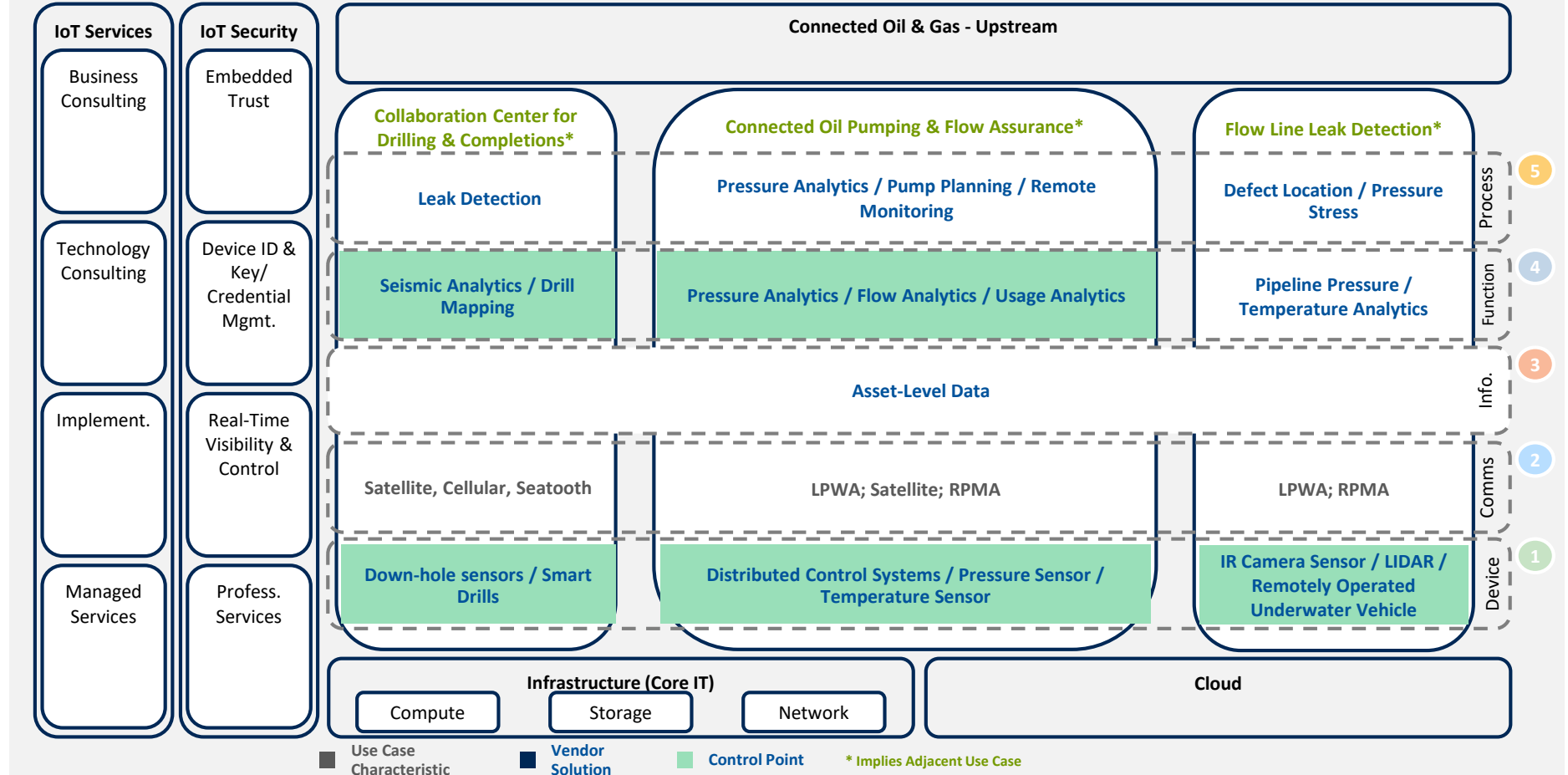
As a starting point, think of what you are trying to achieve by participating in an ecosystem

Visualization of ecosystem can support strategy development...

Actions

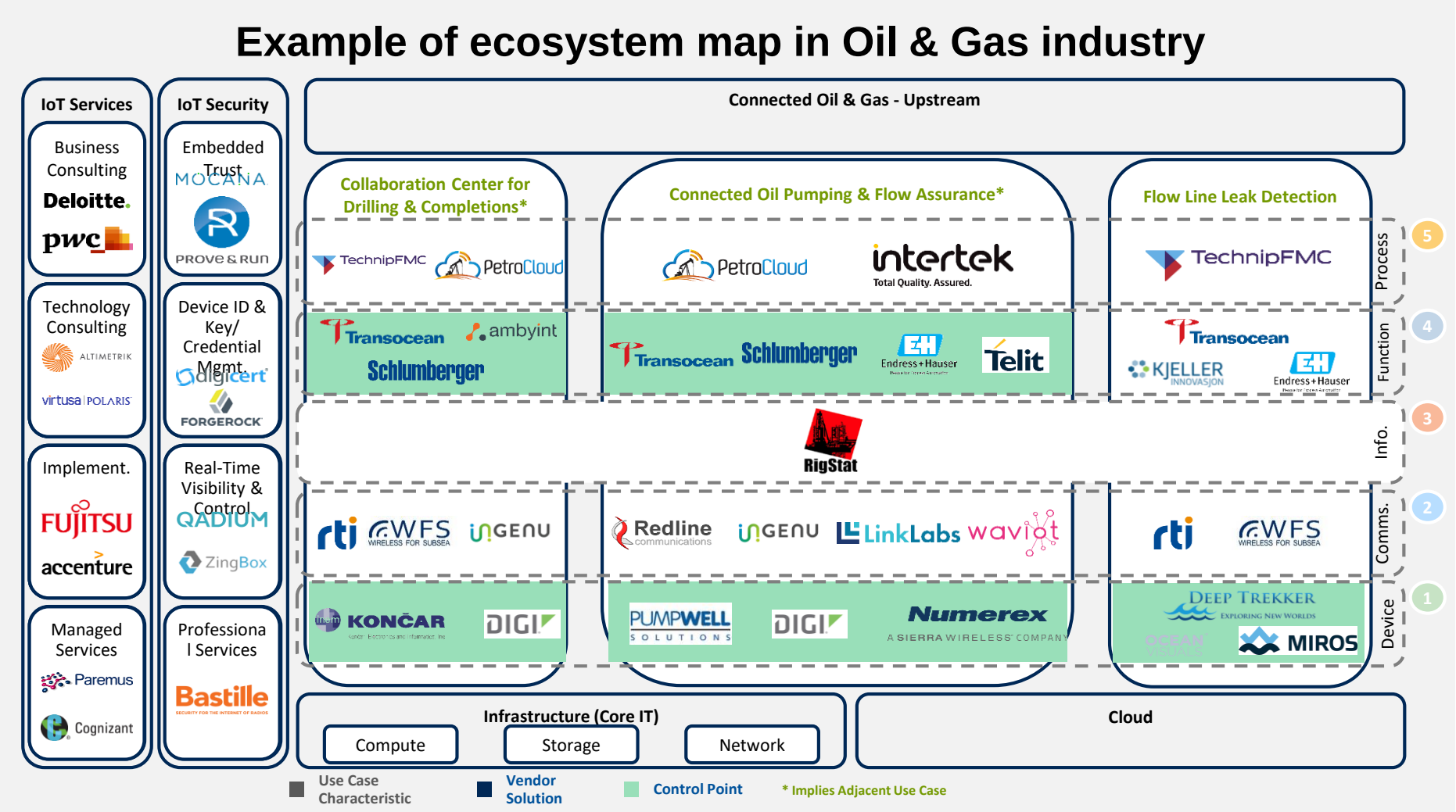
- ✓ Develop understanding of market from customer's perspective
- ✓ Identify customer use cases & tie them to key business outcomes
- ✓ Develop a market/ solution taxonomy
- ✓ Follow the money – where and how does value flow?
- ✓ Uncover control points in ecosystem – can your company own the control point?

Example of ecosystem map in Oil & Gas industry



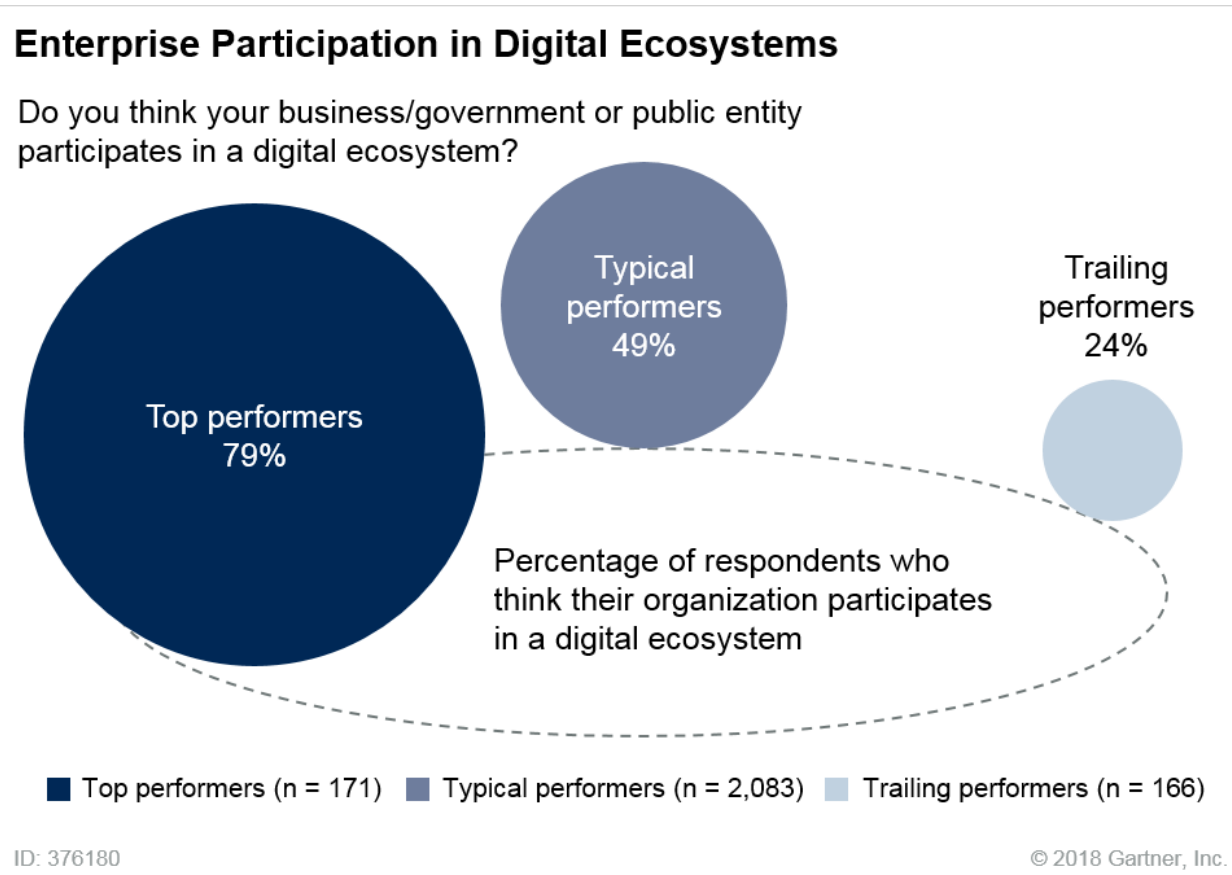
...and can be used to anticipate potential conflicts or synergies

- Actions**
- ✓ Identify companies that play in each intersection
 - ✓ Profile companies to better understand posture and potential mutual benefits
 - ✓ Be prepared when approaching vendors



What are top performers doing differently?

1 Participating in Digital Ecosystems



2 Shifting Culture & Technology

Top performer attributes:

- 1) Interoperability
- 2) External mindset
- 3) Interdependence

Contacts

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Laura Flowerree

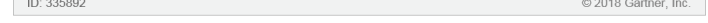
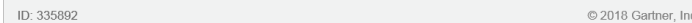
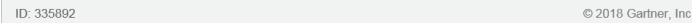
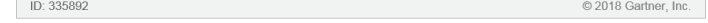
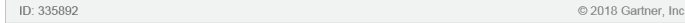
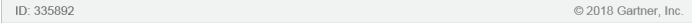
Senior Director

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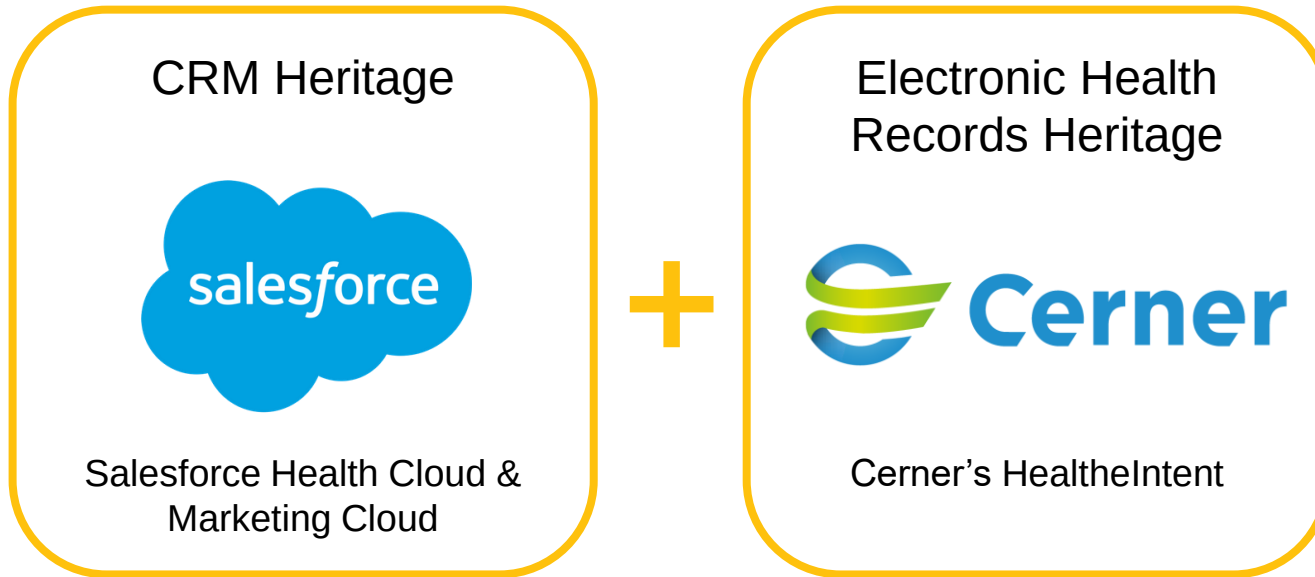
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Example of Leaders: Salesforce and Cerner in Healthcare



"The health care industry is undergoing a powerful transformation. **Patients are bringing new expectations** to their experiences — they want providers to deliver better service on their terms" — Keith Block, COO, Salesforce

The two companies are exhibiting leading qualities:

- **Interoperability –**

- ✓ Salesforce acquired Mulesoft, iPaaS, to support integration
- ✓ Salesforce is part of alliance with other tech giants to create open standards to foster interoperability in Healthcare

- **External Mindset & Mastering Interdependence**

- ✓ Cerner's platform can work with other EHR vendors and enables apps and extensions built to work with other solutions
- ✓ Salesforce committed to using partners to go deep into an industry, customer at center

Questions to ask yourself when creating an ecosystem...

- Prioritize big established players or niche vendors?
- Geographic strategy?
- How many partners in each market do you want to partner with? (+/- of many vs. few)
- What companies are already working with your customers?
- What can you provide to incentivize partners to work with you?
- How do you approach partners? (i.e., company characteristics drive approach)



Questions to ask yourself when managing an ecosystem...

- What is the Go-to-Market strategy? How does a customer find you or your partners?
- What are the rules of engagement with partners? With customers?
- How do you ensure/ take ownership of customer success (particularly as customers move to SaaS model)?
- How do you maintain strong productive relationships with different types of partners?

