

# The Opportunity for Modernization

## *A Tech Data Business Partner Webinar*



Applications



Data



Integration



Automation



MultiCloud



Security

# Today's Speakers



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# Today's Webinar



## How do we address these changes?

- Structural changes in our economy (before and after COVID-19)
- Evolving buying journeys
- Growth of technology marketplaces
- Rise of subscription/consumption models
- Channel programs that are changing partner conversations from margins to multipliers

# The Opportunity for Modernization



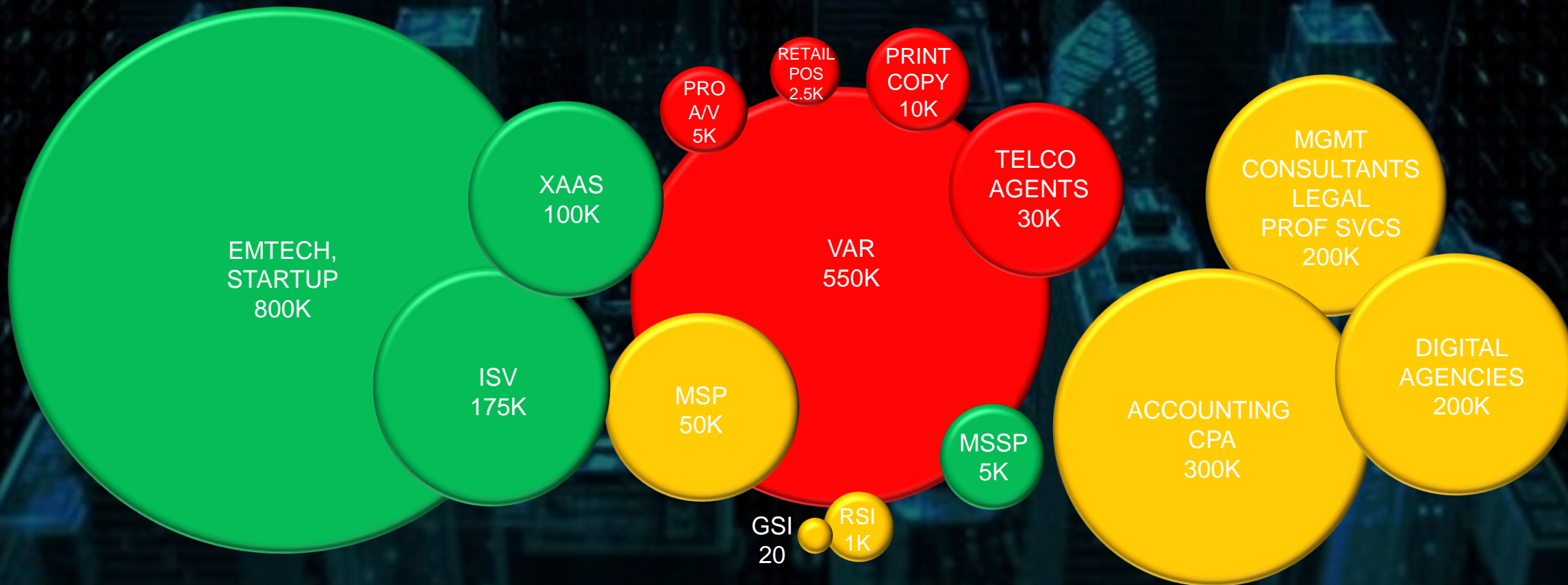
*It's real.  
It's happening.*



**64%** OF TECH INDUSTRY FLOWS INDIRECTLY

# GLOBAL TECHNOLOGY CHANNEL

## MILLIONS OF COMPANIES IN THE ECOSYSTEM



Growing single-digits Y/Y



Flat or slightly declining Y/Y



Decreasing double-digits Y/Y

LINES OF BUSINESS

12

SUBINDUSTRIES

297

COUNTRIES

197

SECTORS, SIZE & SEGMENTS

14

TECHNOLOGY CATEGORIES

26

FORRESTER®

SaaS

35 MILLION  
MARKET OPPORTUNITIES

FORRESTER®

CHALLENGE THINKING. LEAD CHANGE.

4

CURRENT  
OPPORTUNITIES



# AUTOMATION

1

Customers looking for automation of workflows, processes, and business logic. RPA, BPA, and SaaS will thrive in 2021.



2

Customers are accelerating their cloud initiatives. Digital transformation projects will get the green light around cloud infrastructure, platforms, and SaaS.



# 3

Remote work has created different threat vectors and new levels of risk, security, compliance, and redundancy protection are required.



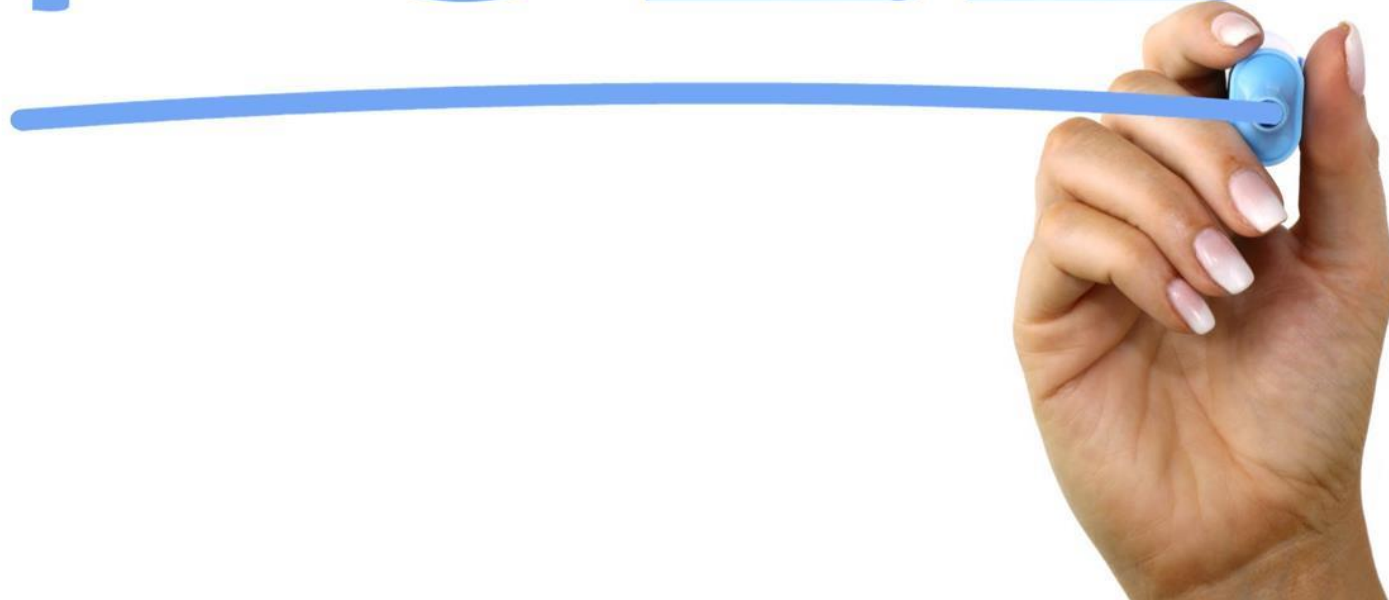
4

Companies are looking for tactical business consulting to help survive and, later, thrive coming out of the economic downturn.



Customer, partner, & employee experience.  
Ecommerce & marketplace investments planned.

POLL



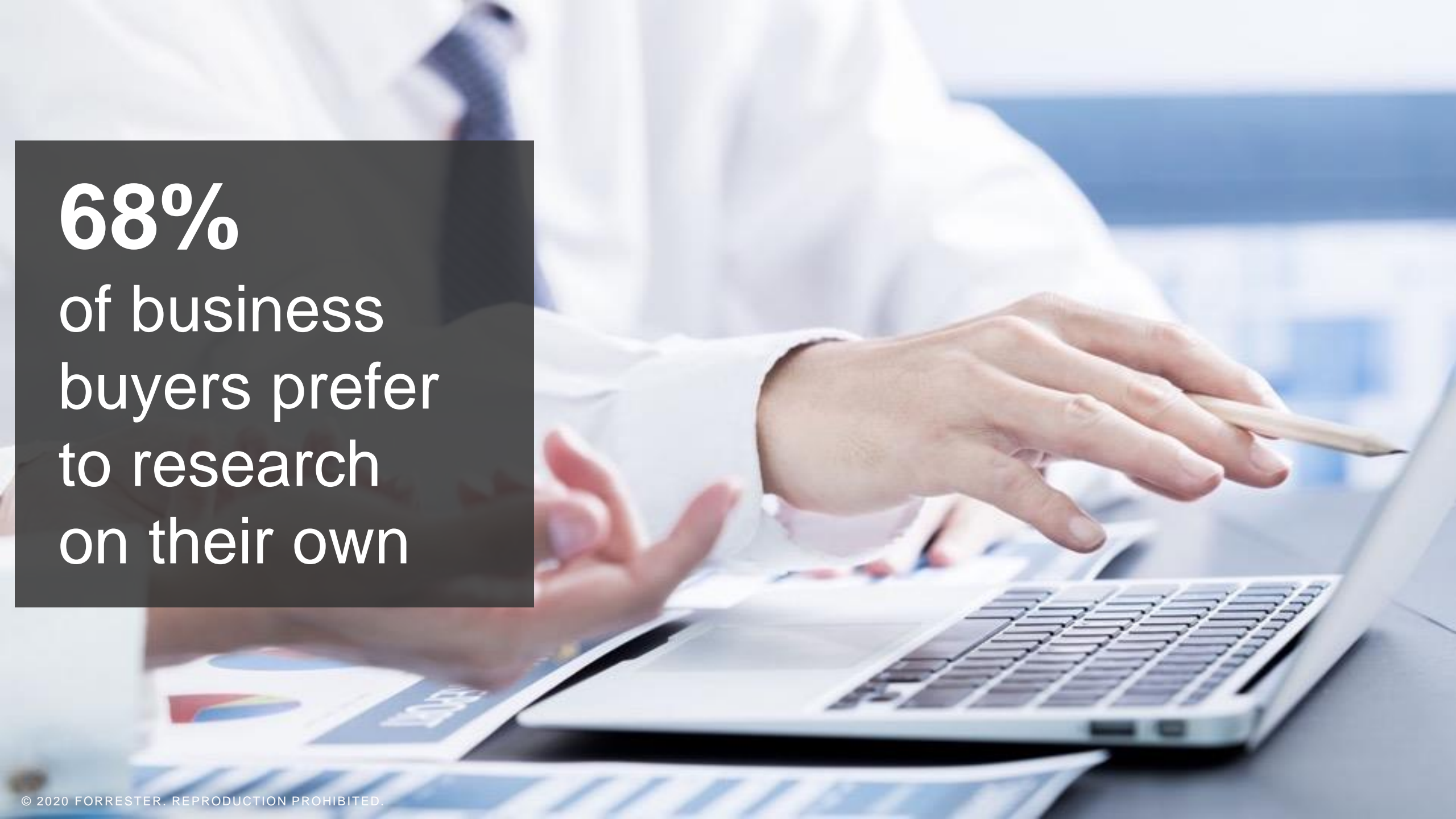
6

PREDICTIONS  
& TRENDS

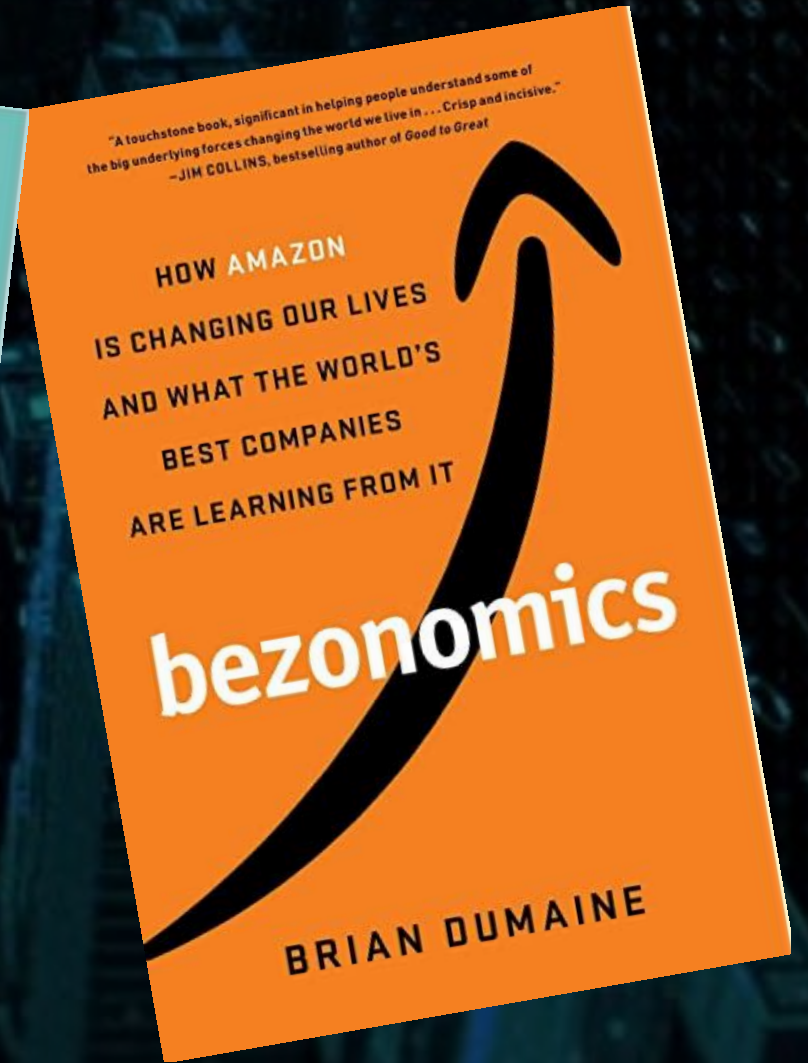
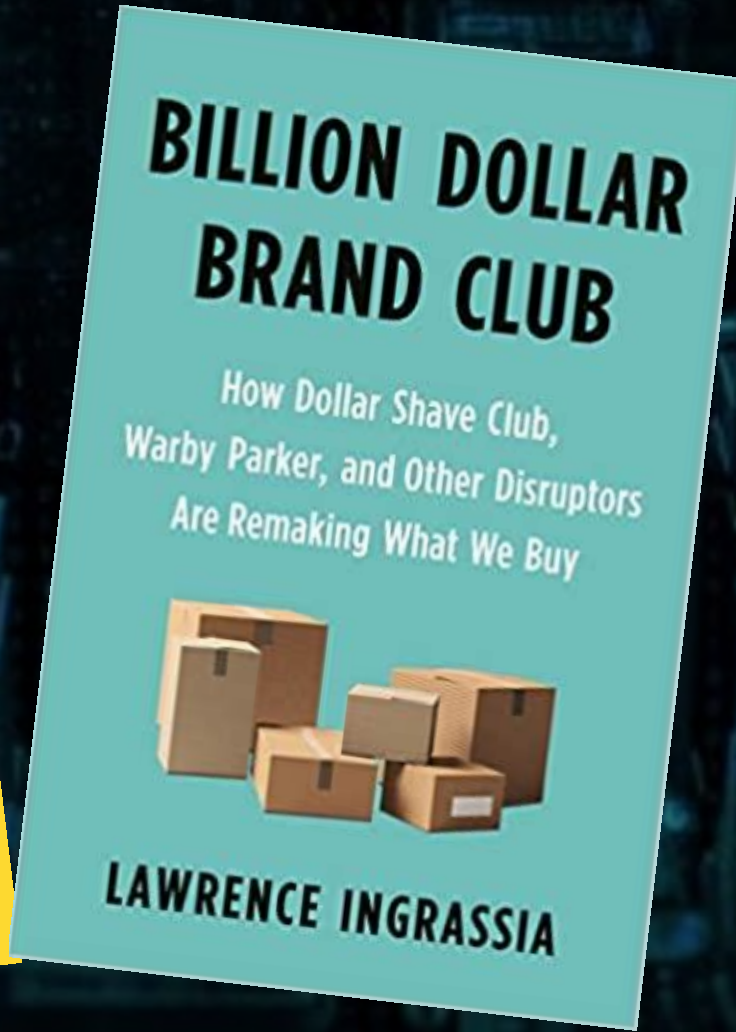
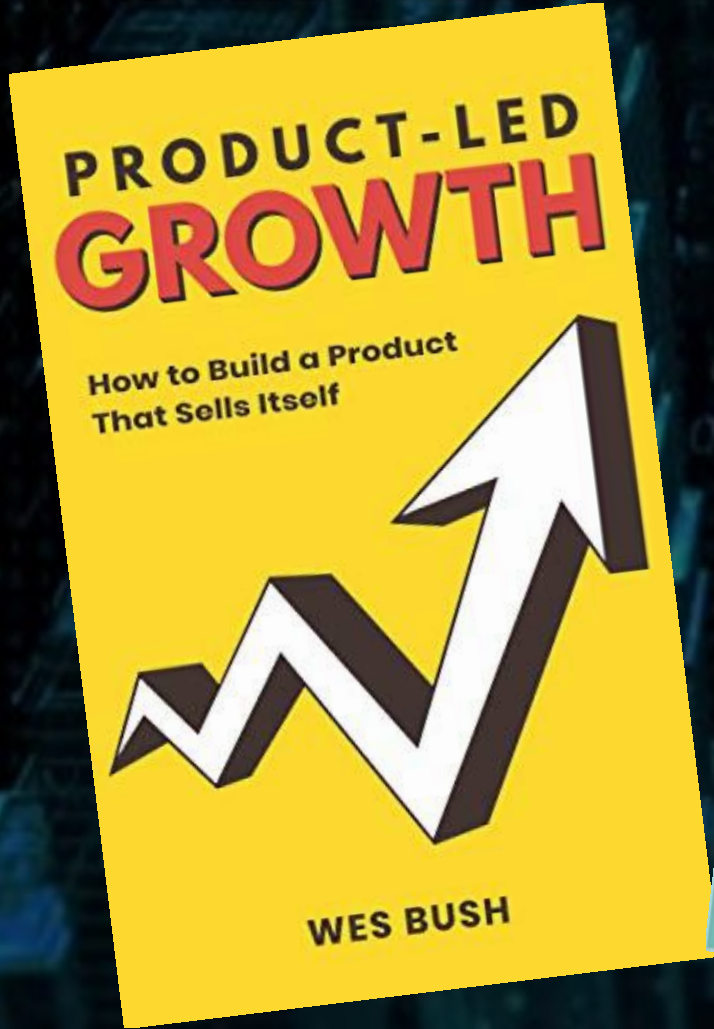
A woman with dark hair pulled back, wearing a grey blazer over a black top, smiling warmly. She is standing in a brightly lit, blurred indoor setting, possibly a hallway or office. The background shows architectural details like columns and arches.

1

The buyer is changing; So is their psychology, behavior, and journey.



**68%**  
of business  
buyers prefer  
to research  
on their own

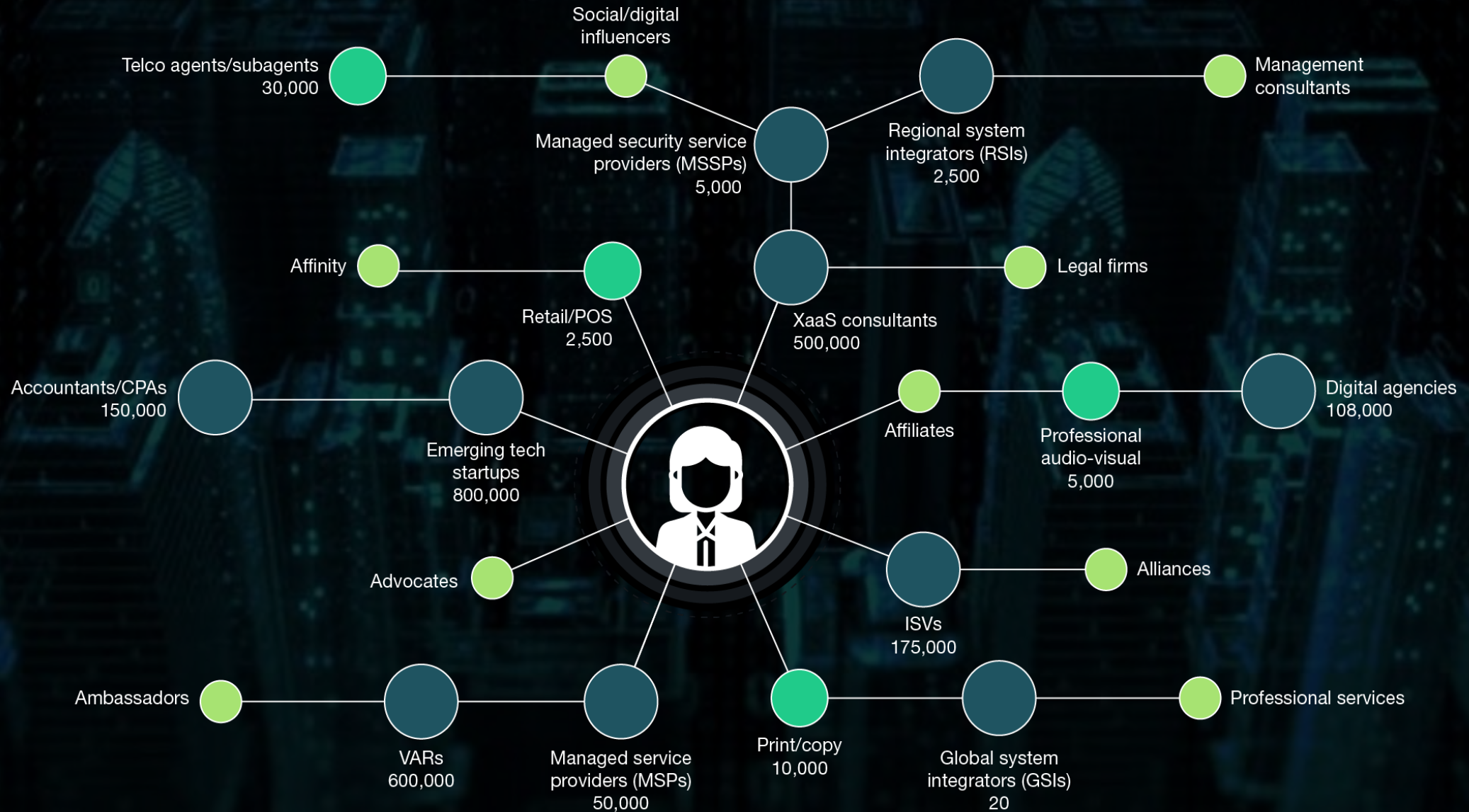




2

Buyers report that new types of channels are helping in their journey

# ECOSYSTEM: INFLUENCE THE INFLUENCERS



Note: Numbers indicate quantities of partner type.



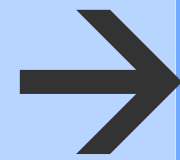
**SUPERCONNECTORS: GATEWAY TO PROSPECTS**

# TRIFURCATING CHANNEL MODEL

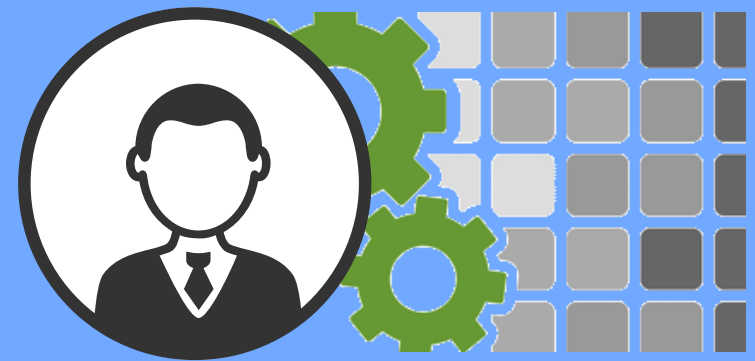
## INFLUENCE CHANNEL



Referral partners, alliances, affinity, affiliates, advocates, ambassadors, influencers, ISVs



## TRANSACTIONAL CHANNEL



Agents, sub-agents, dealers, resellers, VARs, MSPs, marketplaces



## RETENTION CHANNEL



Integrators, consultants, implementors, agencies, shadow channels, ISVs





3

76% of CEOs think their current business model will be unrecognizable



# DIGITAL SOLUTIONS BY STILL

Keep it simple and smart



# STILL neXXt

## The central, digital ecosystem for everything

How do we do that? For example with **STILL neXXt**, our central, digital ecosystem for everything. Imagine having a **master key** to **all product solutions** and **services** giving you **control** to all your **intralogistics** functions. Because that's exactly what STILL neXXt is.

In the digital age, STILL offers you a new simplicity for tomorrow's complexity. You have access to everything from a single source: innovative hardware, user-friendly software and first-class service to rely on at all times. Together we develop a custom-made solution that allows you to set the pace of tomorrow today.

Diagnosis

Fleetmanagement

Assistance systems

Automation

Use cases

Consultation

**Ecosystems** are different from traditional indirect channels in that they are untethered to the financial transaction and focused more on:

1

intrafirm  
**value**  
creation

2

access to  
**network**  
effects

3

partner **CO-**  
**innovation**

as-a-service

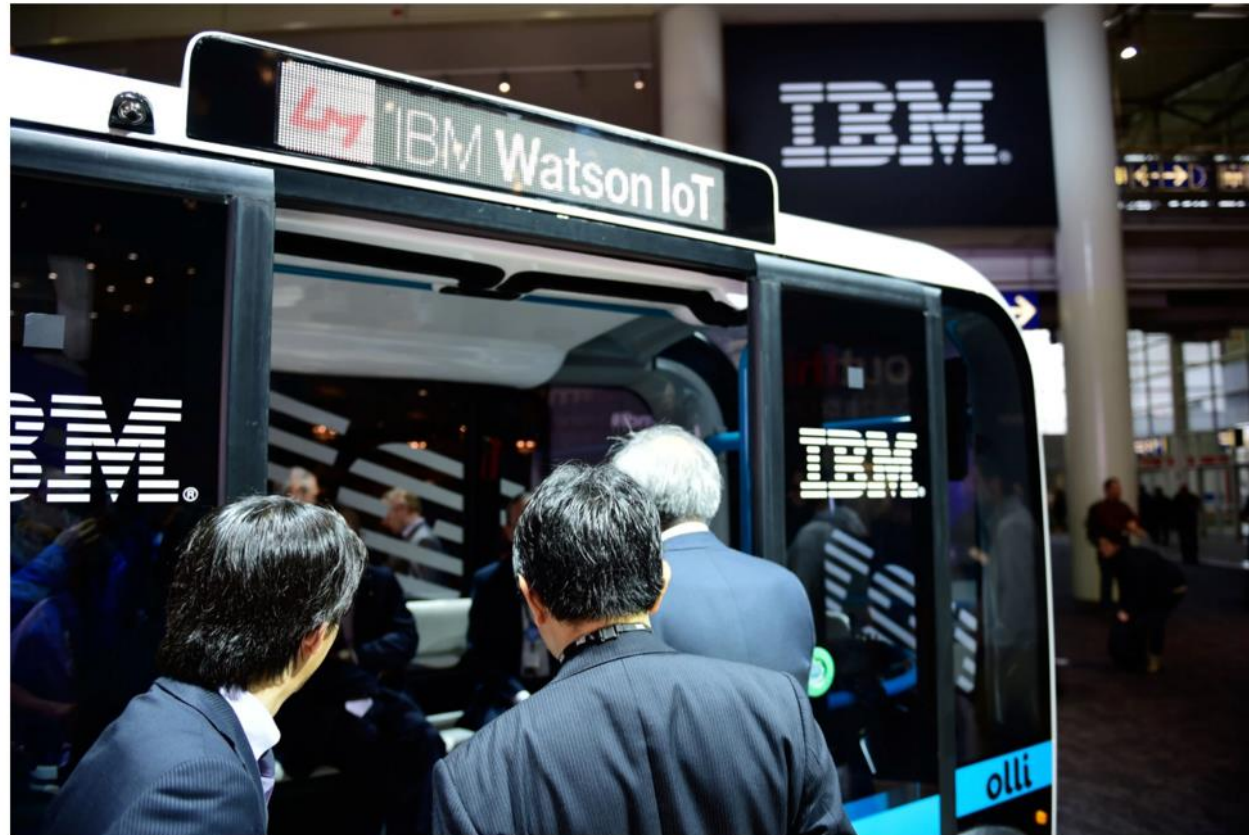


4

The world is shifting to subscription  
and consumption models

## *IBM, Seeing Its Future in the Cloud, Breaks Off I.T. Unit*

The split-up strategy reflects how decisively computing has shifted to the cloud.



IBM announced that it was spinning off its legacy technology services business to focus on cloud computing and artificial intelligence. Alexander Koerner/Getty Images

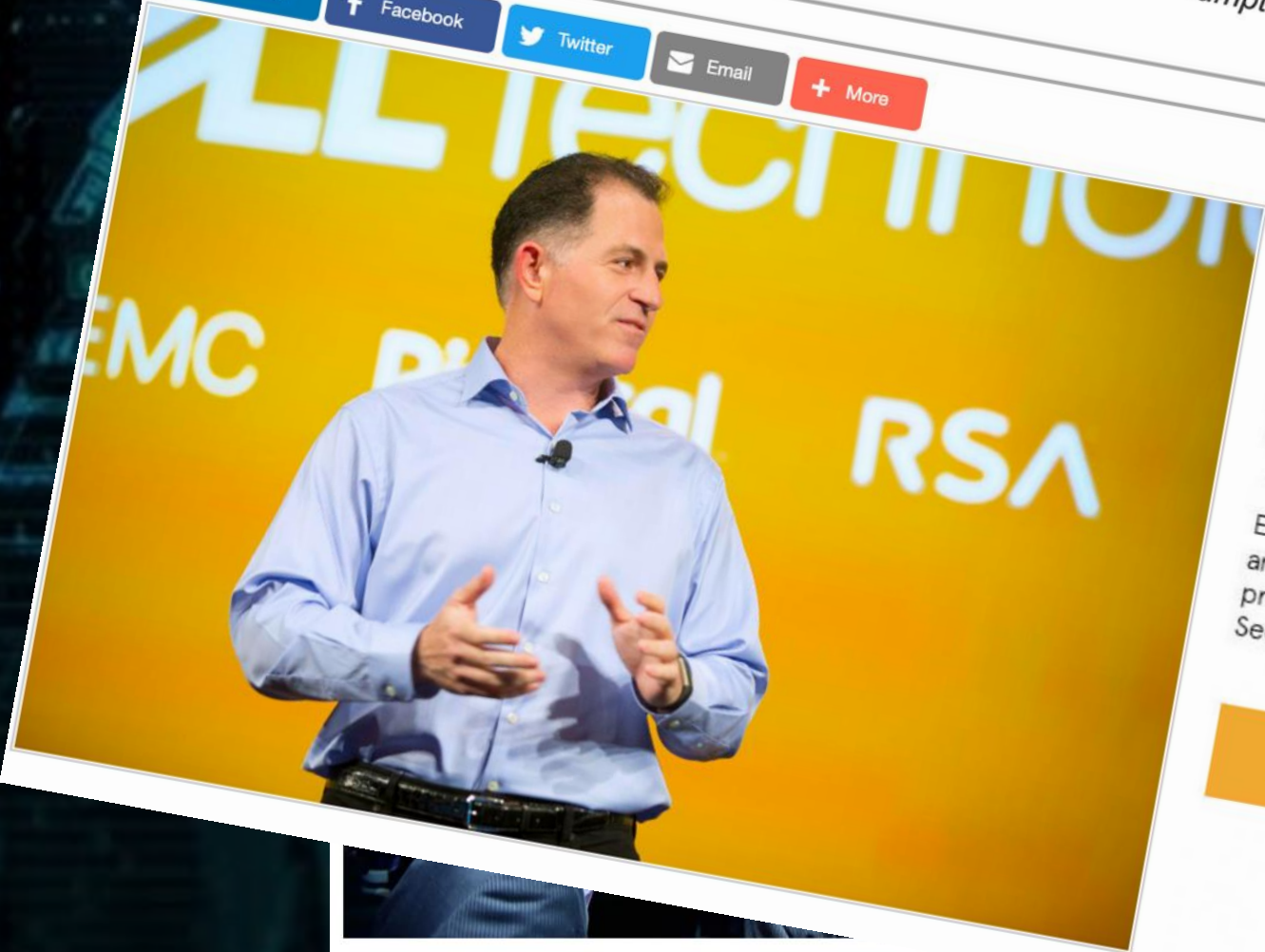
# Dell To Make 'All Offerings' As-A-Service in the Cloud,

'We're in the process of moving the vast majority of our offerings to consumption and as-a-service,' Dell Technologies CEO Michael Dell tells CRN.

By [Mark Haranas](#)

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September 14, 2020, 10:00 AM EDT



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Better Decisions.  
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IBM announced that it was spinning off its legacy technology computing and artificial intelligence. Alexander Koerner/Getty Images

# Dell To Make 'All Offerings' As-A-Service

'We're in the process of moving the entire portfolio to a consumption-based model in the wake of the COVID-19 pandemic, CEO Michael Dell tells CRN'

By [Mark Haranas](#)

August 12, 2020, 06:27 PM EDT

# Cisco CEO Chuck Robbins: COVID-19 Forcing As-A-Service Transition

The tech giant wants to shift its entire portfolio to a consumption-based model in the wake of the COVID-19 pandemic, which Robbins says builds on the 'significant transformation' it has undergone as it focuses on software, services and subscriptions.

By [Gina Narcisi](#)

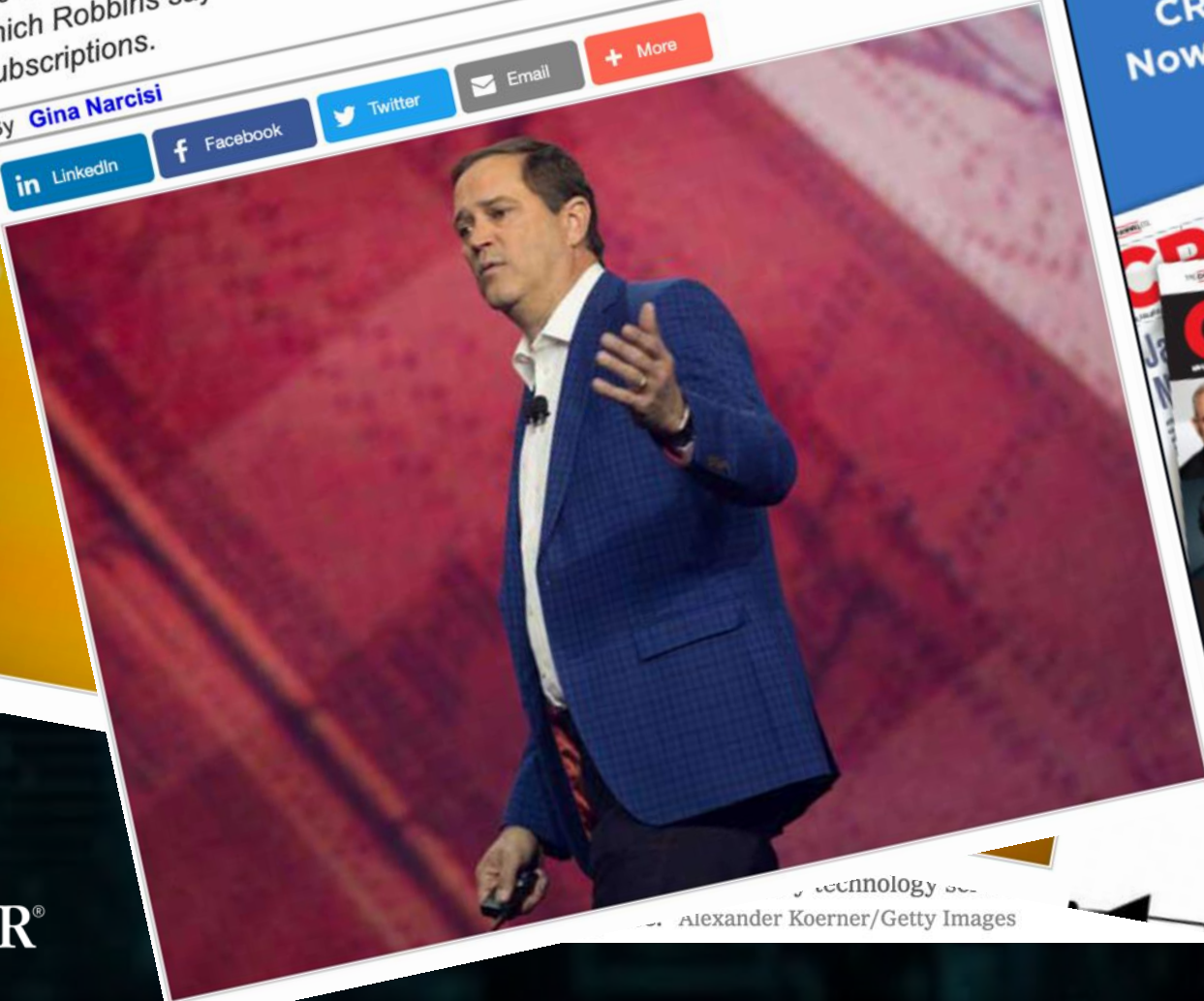
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Technology ... Alexander Koerner/Getty Images

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Technologies

10:00 AM EDT



Dell To Make 'All Or... transition... pandemic,

# HPE Steps Up GreenLake Sales Blitz, Pledges Everything-As-A-Service By 2022

*"Three years from now, this company will become consumption driven and everything we do whether it is at the edge, the core, the cloud business, software or infrastructure and services will be available to you and to our customers as a service," said HPE CEO Antonio Neri.*

By [Steven Burke](#)

June 18, 2019, 05:00 PM EDT

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5

Vendors communicate their ecosystem value or “multiplier”

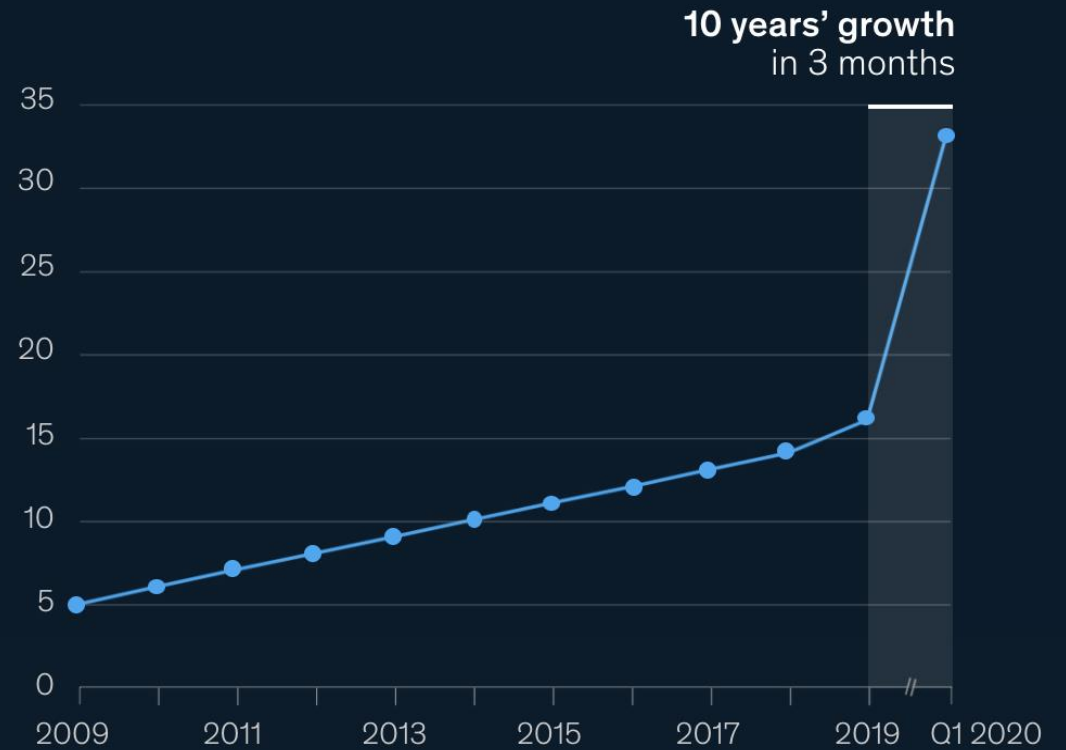


The average  
cloud solution  
has 7 layers

# The leap

How fast is the world moving around us? Consider how quickly e-commerce has replaced physical channels in three months.

US e-commerce penetration, %



Source: Bank of America; Forrester Analytics; ShawSpring Research; US Department of Commerce; McKinsey analysis

# 6

## Marketplaces accelerate the decline of resell

A close-up photograph of a computer keyboard. The central focus is a large, light blue key with the word "Marketplace" printed in bold, black, sans-serif font. To the right and slightly below this key is a dark grey key labeled "Shift" in white font. The background shows other keys in a dark grey color, slightly out of focus. The lighting is soft, highlighting the texture of the keys.

Marketplace

**73%**  
of business  
buyers find buying  
from web more  
convenient.

of B2B  
purchases  
through  
eCommerce  
by ~~2023~~ **2021**



17%

A donut chart with a yellow segment representing 17% and a grey segment representing the remaining 83%. The chart is set against a background of a city skyline at night with glowing windows.

# HYPER MARKETPLACES



# SUPER MARKETPLACES



# NICHE MARKETPLACES

NEW TECH	LATE STAGE	
Marketplace Development Platforms and Tools Q4 2020	Airwallex	G2.com
	AppDirect	Mirakl
	Checkout.com	Tech Data
	Coveo	VTEX
GROWTH STAGE		
Aria Systems	Productsup	
Bloomreach	Salsify	
BlueSnap	Spryker	
CloudBlue	Vendasta	
Freightos	ZNet Technologies (RackNap)	
Jungleworks		
Lengow		
EARLY STAGE		
Arcadier	Modalyst	
Balluun	Neteven	
channelcentral.net	Perfect Channel	
ChannelEngine	PunchOut2Go	
ChargeAfter	Shoperly	
Four51	Shuup	
IZBERG	Tackle.io	
Limonetik	VoPay	

# Q&A



# Making the Next Step

## Call to Action


- ➔ **Learn** how Tech Data will help you analyze your sales to determine top opportunities in top markets. **Engage** with your Tech Data teams for assistance
- ➔ **Register** for the second session: [“Becoming the Modern Business Partner”](#)
- ➔ **Don’t miss** IBM Cloud’s Best kept secrets [Register today](#)
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**Becoming the Modern Services Partner Webinar**  
**Date:** March 25, 2021  
**Time:** 2:00 EST/1:00 CST/12:00 MST/11:00 PST  
**Length:** 1 Hour  
**Speaker:** **Amanda LeClair**, Principal Analyst – Channels, Partnerships and Alliances, Forrester Research  
[Click to Register](#)

**Guest Speaker**



Amanda LeClair, Analyst – Channels, Partnerships and Alliances, Forrester Research

**FORRESTER**



**IBM Cloud** **TechData**

**Journey to the Cloud:  
The Best Kept Secrets of IBM Cloud**

**IBM** Join Paulo Carvão the General Manager of IBM’s Cloud Business to hear about the best kept secrets of IBM Cloud

**Guest Speaker**



Paulo Carvão, General Manager, IBM Cloud Platform - Americas

Learn how clients have leveraged IBM’s best kept secrets to accelerate their Cloud Journey.

**Key Webinar Take-aways:**

- ✓ Hear about IBM’s Hybrid Multi-Cloud Strategy and New Solutions
- ✓ Get the Keys to Starting or Accelerating Your Cloud Journey
- ✓ Learn How to Leverage IBM Eco-System Partners as Trusted Advisors

[Click to Register](#)  
**Date:** March 9th, 2021  
**Time:** 1:00pm Eastern  
**Length:** 1 Hour

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**TechData**

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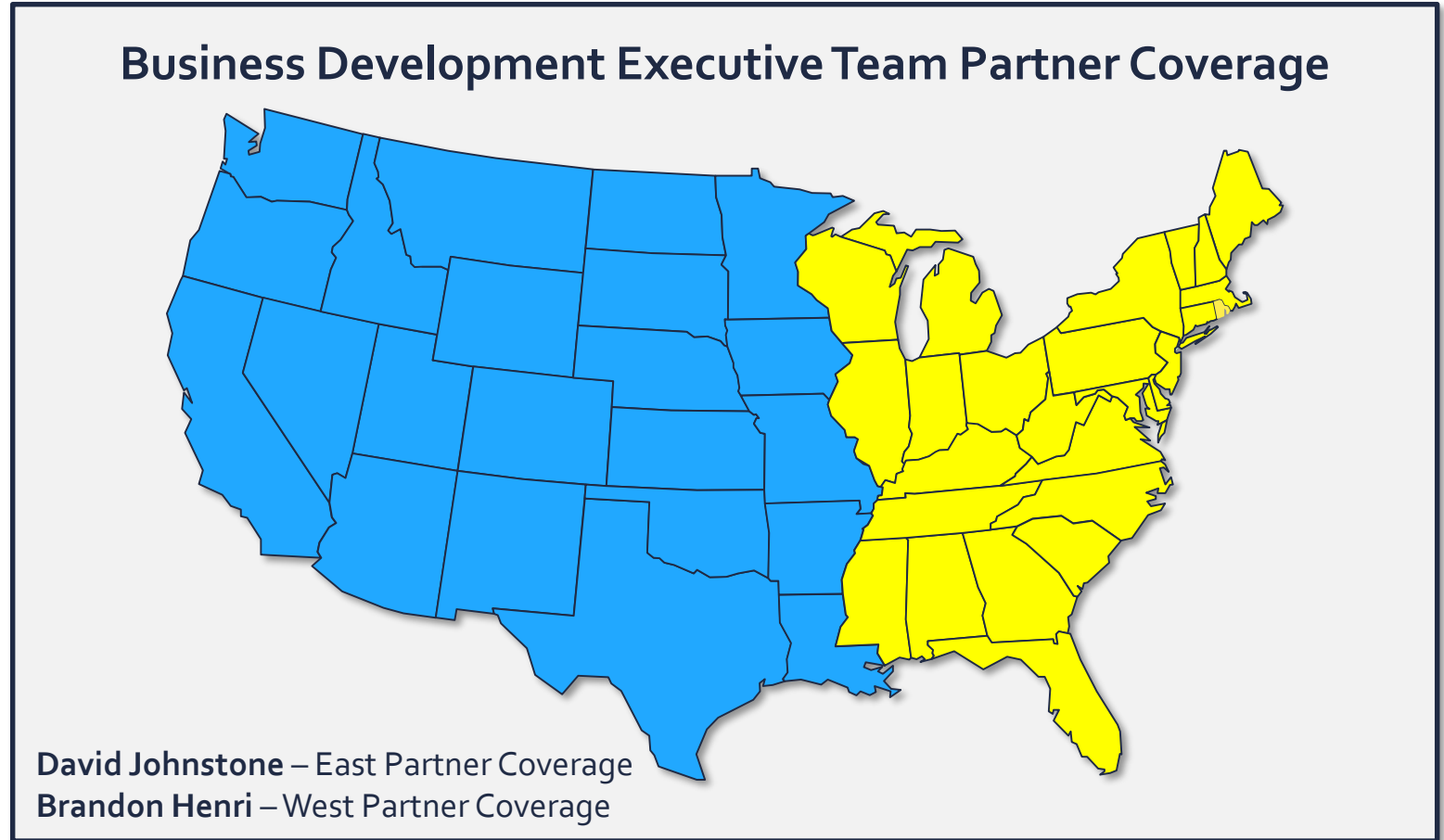
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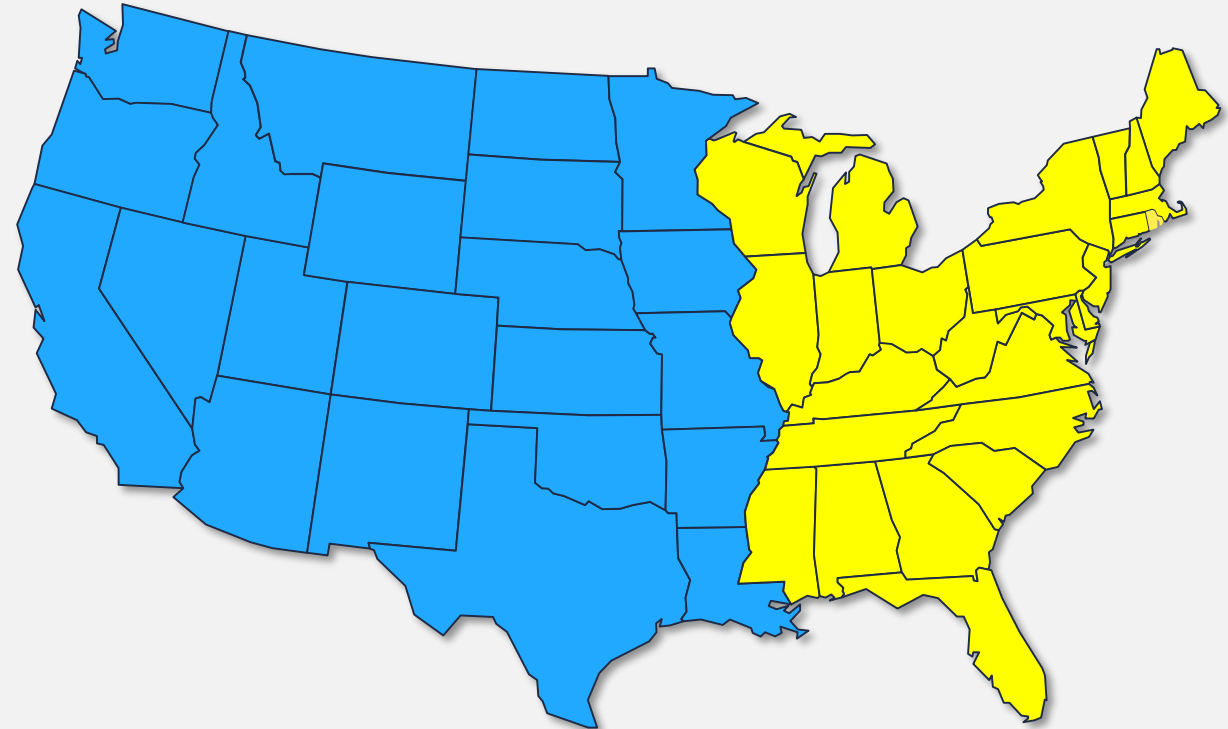
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### Business Development Executive Team Partner Coverage



Steve Croop – East Partner Coverage

Craig Ross – West Partner Coverage



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Thank You!