



**ETR**

Enterprise  
Technology  
Research

# ETR+ NAVIGATION & TSIS + ETS TUTORIALS



# OUR RESEARCH

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ENTERPRISE TECHNOLOGY RESEARCH TEAM,  
METHODOLOGY, AND PROPRIETARY RESEARCH SOURCES

# OUR RESEARCH TEAM

## DATA

**DANIEL FREDRIKSEN**  
CHIEF DATA SCIENTIST

**VINCENT CHANG**  
SENIOR DATA SCIENTIST

**JULIA XU**  
COMMUNITY ANALYTICS LEAD

**JASON SHU**  
DATA SCIENTIST

**WINNIE NG**  
DATA SCIENTIST

## SALES + SERVICE

**BRADLEY LASCOLEA**  
EVP, SALES + SERVICE

**MARK SMALDON**  
VP, SALES + SERVICE

**ANDREW LICINI**  
ASSOCIATE, SALES + SERVICE

**ATHENA PETREDIS**  
ASSOCIATE, SALES + SERVICE

**HAROLD PARK**  
SR ACCOUNT EXECUTIVE

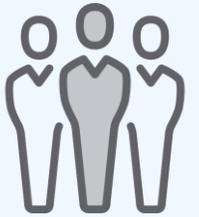
## VENN

**ERIK PORTER BRADLEY**  
CHIEF ENGAGEMENT STRATEGIST

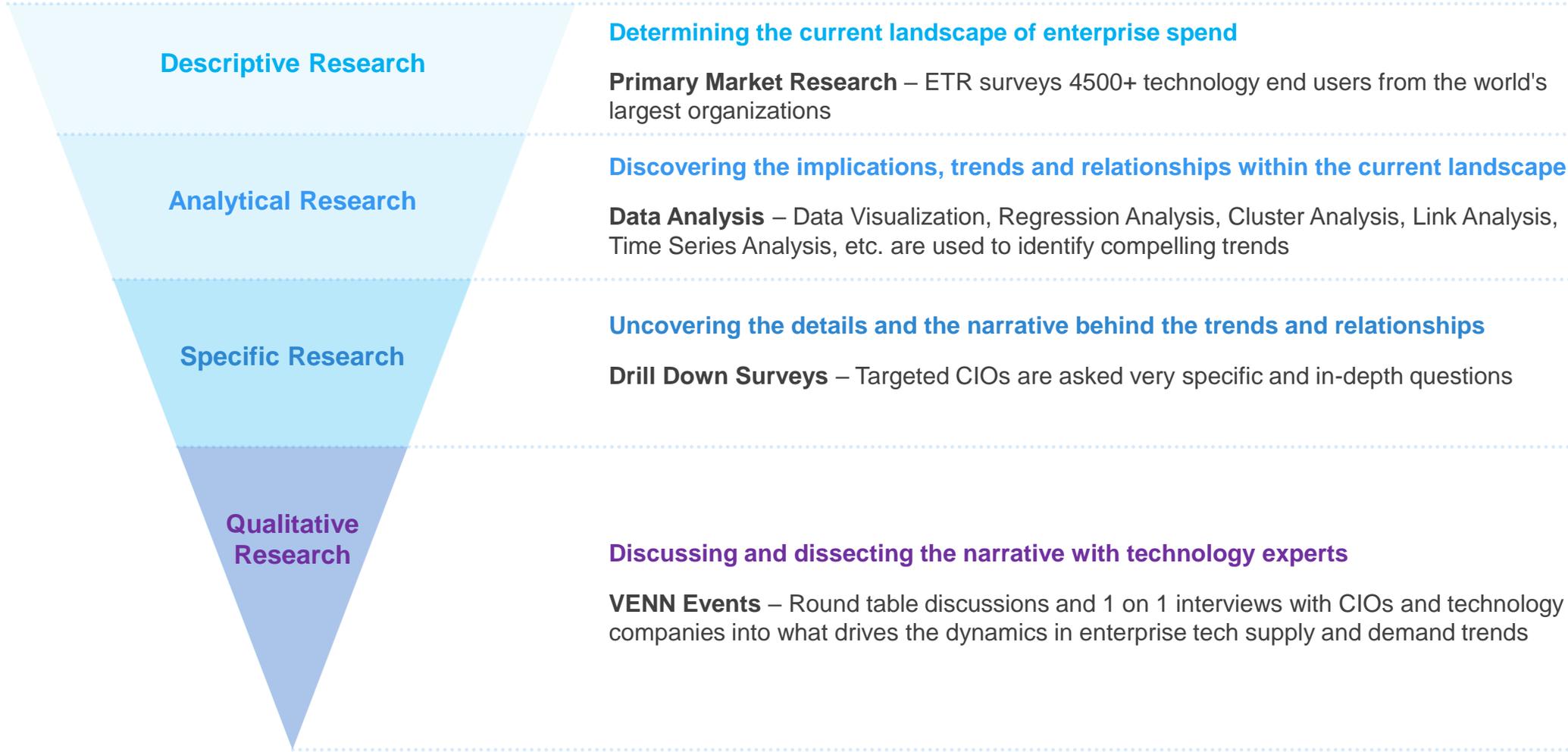
**JAKE FABRIZIO**  
MARKET RESEARCH COORDINATOR

## RAMP

**DANIEL ENTRUP**  
HEAD OF RAMP



# OUR METHODOLOGY



# OUR PROPRIETARY RESEARCH SOURCES



## Technology Spending Intentions Survey (TSIS)

Performed quarterly, we measure consumer appetite among enterprise IT leadership towards legacy and emerging technology vendors

### Quantitative Research

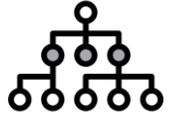
Statistically significant trends from a curated sample of the most influential 5000+ CIOs, globally



## Emerging Technology Study (ETS)

### Identify Threats + Opportunities

Capturing the enterprise awareness & evaluations of emerging technology vendors, across the global IT market



## Drill Downs

### In-Depth Analysis

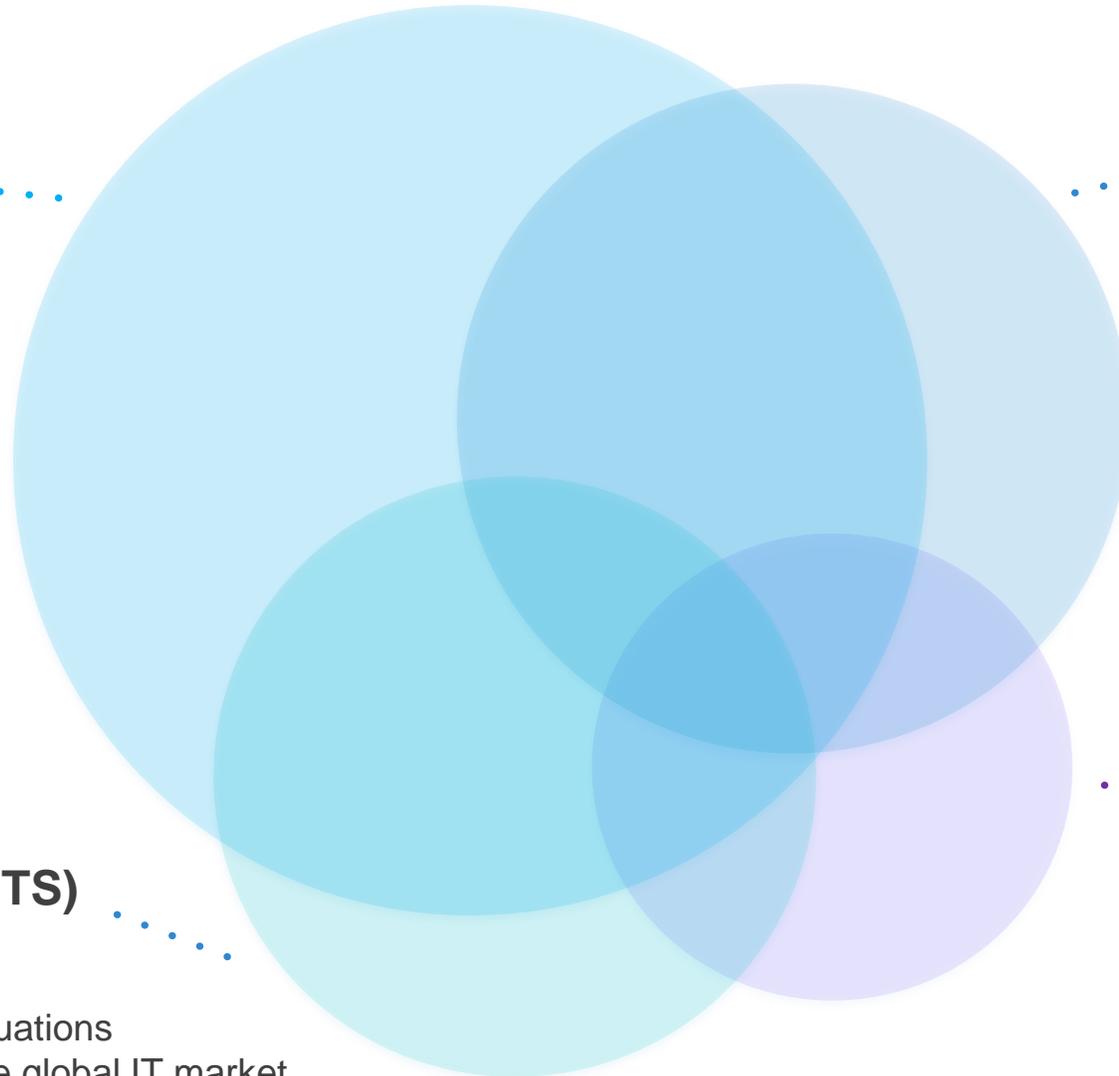
Logic-triggered drill downs into the reasoning & driving factors behind the trends shaping the enterprise technology landscape



## V E N N

### Qualitative Research

Discovery through discussion into the context for emerging trends in the data



# Technology Spending Intentions Survey

the TSIS by **ETR**

In this survey, we're capturing forward-looking spending intentions for technology vendors across the global market in order to gauge enterprise demand for their products and technologies. Leveraging the results, our community of 5000+ IT decision makers are able to benchmark their department's IT architecture against peers, the investment community gains unbiased purview into market share movements and technology shifts, and technology vendors can identify key areas of strength and weakness in order to optimize product development and marketing efforts.

Representing \$555 billion in total annual IT spend, ~1269 CIOs participated in the most recent study, 443 of which are Global 2000 IT decision makers (ITDMs), and 265 of which are in the Fortune 500. This study covers 324 technology frameworks and products, making this the most comprehensive study on the market.

[See the TSIS Tutorial.](#)

## TSIS ANSWER OPTIONS

### Adoption

Organization plans to adopt a new vendor or product

### Increase

Organization plans an increased spend of +6% or greater for a vendor or product

### Flat

Organization plans a flat spend of -5% to +5% for a vendor or product

### Decrease

Organization plans a decreased spend of -6% or less for a vendor or product

### Replacing

Organization intends to replace, put in containment, remove or swap-out this vendor or product

# Emerging Technology Study

the ETS by **ETR**

In this study, we're not only capturing the enterprise appetite for emerging technology vendors across the global market, but we're **informing** 5000+ IT Decision Makers of which emerging companies they should be evaluating and utilizing, **providing** the investment community an unparalleled look into how their portfolio companies are performing in the enterprise, including which established vendors their portfolio companies are impacting and potential acquirers, and **educating** the companies we track with key performance metrics impacting their sales funnel and product-market fit.

Representing \$380 billion in total annual IT spend, ~811 CIOs participated in the most recent study, 266 of which are Global 2000 IT Decision Makers (ITDMs), and 155 of which are in the Fortune 500. This study covers 365 emerging technology frameworks and products, making this the most comprehensive study on the market.

[See the ETS Tutorial.](#)

## ETS ANSWER OPTIONS

Plan to Evaluate within 6 months

Organization plans to evaluate in the next 6 months

Currently Evaluating

Organization is currently evaluating

Evaluated, Plan to Utilize

Organization evaluated, plans to adopt

Allocating Further

Organization is currently using the vendor in production

Aware of, NO Plan to Evaluate

Organization is aware of, but has no plans to evaluate

Evaluated, NO Plan to Utilize

Organization evaluated, decided not to adopt

Replaced or In Containment

Organization has replaced or intends to replace the vendor

Leveraging ETR's data, the **VENN Events and Content platform** generates a complementary stream of qualitative intelligence, giving those with access unprecedented insights into the enterprise technology landscape of today and tomorrow.

**130+** sessions since launch

**1500+** live and virtual participants

**16,000+** minutes of audio

**2,000,000+** words transcribed and searchable [\[see transcript search\]](#)

### VENN Library

- Intuitive, language-based search functionality
- Quickly assemble feedback from the entire library of transcripts

### Universal Participation

- Investors
- IT Decision Makers
- Vendor Leadership

### Content Generation

- Summary
- Full Transcript
- Replay
- Custom Reports
- Trend Analysis

## Select Highlights

**American Airlines** | Chief Infrastructure Architect  
**Anaconda** | CTO + Co Founder  
**Aporeto** | CEO  
**Apstra** | David Cheriton [Google, VMware, Arista]  
**Carbon Black** | CTO + Co Founder  
**Cherwell Software** | CMO  
**Coca-Cola FEMSA** | CIO  
**Cylance** | CSO  
**Docker** | COO + Director Northeast  
**GE Power** | CIO  
**Guardian Life Insurance** | Information Security Officer  
**Mastercard** | CTO  
**MemSQL** | CEO + Co Founder  
**Mesosphere** | CEO + Co Founder  
**Nedbank** | Retail CIO  
**Nutanix 'Data-Curated'** | President  
**Owens-Illinois** | CIO  
**Pivotal** | CTO + fmr. Co Founder, OpenStack  
**Puppet** | CEO  
**Rancher Labs** | Co Founder  
**Rapid7** | CTO + Co Founder  
**RBC Capital Markets** | Cybersecurity & Risk  
**Snowflake** | VP of Customer and Product Strategy  
**StackRox** | CEO  
**Tata Communications** | CIO  
**Twistlock** | CEO + Co Founder  
**Zscaler** | CEO + Founder

# ETR+ NAVIGATION

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ACCESS OUR WEEKLY NEWSLETTER, RESEARCH  
REPORTS, VENN EVENTS AND TRANSCRIPTS,  
AND DATA VISUALIZATION DASHBOARDS

# ETR+ NAVIGATION HOME PAGE

The screenshot shows the ETR+ navigation home page. On the left is a dark blue navigation menu with the ETR+ logo at the top. The menu items are: HOME, NEWSLETTER, MARKETPLACE, MY REPORTS, VENN, ETS DATA, and TSIS DATA. At the bottom of the menu are links for User Journey Guide, Terms of Use, Privacy Policy, and Help. The main content area has a search bar at the top with the text 'Search the Marketplace...'. To the right of the search bar is a user profile dropdown for 'VINCE CHANG'. Below the search bar is a 'FEATURED' section with a grid of logos: QUICK TAKES, ADDITIONAL VENDOR COMMENTARY, WEBINAR HIGHLIGHTS, f5, aws, ATLISSIAN, JUNIPER NETWORKS, and proofpoint. Below this is an 'ETS - Emerging Technology Study (Summer 2019)' section with a grid of logos: EMERGING TECHNOLOGY STUDY, FINDINGS WEBINAR EMERGING TECHNOLOGY STUDY, rubrik, MEMSQL, sprinklr, LUCIDEUS, SalesLoft, and Cherwell SOFTWARE. At the bottom is a 'Trending Articles' section with four article thumbnails: 'JULY 2019 TSIS 10k View', 'ZOOMING INTO UNCHARTED (VALUATION) TERRITORY', 'JULY 19TH 2019 This Week in the Enterprise', and 'Truth in Depetion'. On the right side of the page is a 'VENN' section with 'Upcoming Events' and an 'Intercom' chat window. The chat window shows a profile for 'Brad' and a message input field. Three yellow callout boxes are present: '1' points to the navigation menu, '2' points to the search bar and user profile, and '3' points to the Intercom chat window.

[1] Navigation Menu – Quickly jump between:

- [Newsletter](#)
- [Marketplace](#)
- [My Reports](#)
- [VENN Calendar](#)
- [VENN Transcript Search](#)
- [ETS Data + TSIS Data](#)

[2] Account Information –

- (a) Edit your personal information such as name, email, password
- (b) Manage your registered devices
- (c) View your subscription plan details
- (d) See a history of reports you've purchased

[3] Contact the ETR team via Intercom

# ETR+ NAVIGATION HOME PAGE

The screenshot shows the ETR+ navigation home page. On the left is a dark blue sidebar with the ETR+ logo and navigation links: HOME, NEWSLETTER, MARKETPLACE, MY REPORTS, VENN, ETS DATA, and TSIS DATA. At the top of the main content area is a search bar labeled 'Search the Marketplace...' and a user profile dropdown for 'VINCE CHANG'. The main content is divided into three sections: 1. 'FEATURED' section, which includes 'TSIS - Technology Spending Intentions Survey (July 2019)' with sub-sections for QUICK TAKES, ADDITIONAL VENDOR COMMENTARY, WEBINAR HIGHLIGHTS, and logos for AWS, ATLISSIAN, JUNIPER NETWORKS, and proofpoint. Below this is 'ETS - Emerging Technology Study (Summer 2019)' with sub-sections for FINDINGS EMERGING TECHNOLOGY STUDY, FINDINGS WEBINAR EMERGING TECHNOLOGY STUDY, and logos for rubrik, MEMSQL, sprinklr, LUCIDEUS, SalesLoft, and Cherwell SOFTWARE. 2. 'Trending Articles' section at the bottom, featuring four article thumbnails: 'JULY 2019 TSIS | One Star Begins to Glow Brighter | 10k View', 'ZOOMING INTO UNCHARTED (EVALUATION) TERRITORY', 'JULY 19TH, 2019 | This Week in the Enterprise', and 'Truth in Depetion'. 3. 'VENN' section on the right, which lists 'Upcoming Events' (VENN 1.25 Rapid7) and 'Past Events' (VENN 3.100 Pivotal, VENN 3.99 Indico, VENN 3.98 Tigera, VENN 3.97 Illusive Networ, VENN 3.96 Awake Securit, VENN 3.95 Exabeam). A chat icon is visible in the bottom right corner of the page.

[1] See the latest TSIS and ETS reports we've published. Reports for vendors with upcoming earnings can typically be found here.

[2] View trending articles from the latest newsletter

[3] Access the most recent VENN events and see what's coming next

# ETR+ NAVIGATION NEWSLETTER

The screenshot shows the ETR+ 'The Archive' page. On the left is a dark teal sidebar with navigation links: HOME, NEWSLETTER (with a dropdown arrow), CURRENT NEWSLETTER, ARCHIVE, MARKETPLACE, MY REPORTS, VENN, ETS DATA, and TSIS DATA. At the bottom of the sidebar are links for User Journey Guide, Terms of Use, Privacy Policy, and Help. The main content area has a dark blue header with the title 'The Archive'. A search bar is located below the header with the placeholder text 'Search our Archive... e.g. title, date(April 2019)'. Below the search bar is a section titled 'What are you looking for?' with two filter buttons: 'Articles' and 'Newsletters'. Three article cards are displayed below the filters. The first card has a blue background with a line chart and the text 'I love it when a plan comes together'. The second card has a dark blue background with the text 'July 19th, 2019 Newsletter'. The third card has a red and orange background with the text 'The 10k' View | One Star Begins to Glow Brighter...'. A search bar at the top of the page has the placeholder 'Search the Marketplace...' and a dropdown menu showing 'VINCE CHANG'. Three yellow callout boxes with numbers 1, 2, and 3 point to the 'ARCHIVE' link in the sidebar, the search bar, and the filter buttons respectively.

[1] Select between viewing the latest edition of our newsletter or use the archive to find historical posts

[2] Use any keyword(s) to search through all historical newsletters and articles

[3] Filter search results to just articles or just newsletters

# ETR+ NAVIGATION MARKETPLACE

The screenshot displays the ETR+ Navigation Marketplace interface. On the left is a dark blue sidebar with navigation options: HOME, NEWSLETTER, MARKETPLACE, MY REPORTS, VENN, ETS DATA, and TSIS DATA. At the top of the main area is a search bar with the placeholder text "Search the Marketplace..." and a magnifying glass icon. Below the search bar are filter controls for Vendor (All), Sector (All), and Report Type (All). A dropdown menu for Report Type is open, showing options: All, VENN, Drill Down, ETS, TSIS, and VEC. The main content area is a grid of report cards, each featuring a vendor logo, the report title (e.g., "Microsoft - JUL19 TSIS"), the vendor name, and the sectors. Callouts 1-4 highlight specific features: 1 points to a star icon on a report card; 2 points to the search bar; 3 points to the Report Type filter dropdown; and 4 points to a star icon on the Workday report card. At the bottom left of the sidebar, there are links for "User Journey Guide", "Terms of Use", "Privacy Policy", and "Help".

[1] The Marketplace is a repository of our latest research reports

[2] Users can search through report descriptions by keyword(s)

[3] Users can also filter to specific vendors, sectors or report types

[4] Add a specific report to your Favorites for quicker access

# ETR+ NAVIGATION MY REPORTS

[1] Access My Reports to find all the reports that belong to your account

[2] My Reports contains an archive of reports you have access to. TSIS and ETS reports from past surveys can be found here.

[3] Favorited reports and data visualization dashboards are saved to your Favorite Items for quick access

# ETR+ NAVIGATION VENN CALENDAR

The screenshot displays the ETR+ VENN calendar interface. On the left is a dark blue sidebar with navigation options: HOME, NEWSLETTER, MARKETPLACE, MY REPORTS, VENN (highlighted with a yellow arrow labeled '1'), ABOUT VENN, CALENDAR, TRANSCRIPT SEARCH, ETS DATA, and TSIS DATA. At the bottom of the sidebar are links for User Journey Guide, Terms of Use, Privacy Policy, and Help. The main content area features a search bar, a user profile 'VINCE CHANG', and a calendar for June 2019. The calendar has several days highlighted: June 25 (blue, with a yellow arrow labeled '2'), June 28 (yellow, with a yellow arrow labeled '4'), and June 30 (yellow, with a yellow arrow labeled '3'). An 'Event Info' panel is open for the event on June 25, showing details for 'VENN 3.96 Awake Security' at 2:30 PM (EST) featuring Rahul Kashyap, CEO of Awake Security. Below the event info is a 'File Type' dropdown menu with options: Transcript (selected), Abstract, Full Recording, and Event Deck. At the bottom of the main area are two buttons: 'LEARN ABOUT VENN' and 'SEARCH ALL VENN EVENTS'. A chat icon is visible in the bottom right corner.

[1] Use the VENN calendar to see the schedule of past and future events

[2] Click on highlighted days to see details of the event scheduled for that day

[3] Event Info will include the time, speaker details and an introduction to topics being covered

[4] Each VENN event is published with a Transcript, Abstract, Full Recording, and accompanying Event Deck. View or Download after selecting the file.

# ETR+ NAVIGATION VENN TRANSCRIPT SEARCH

ETR+

Search the Marketplace...

VINCE CHANG

KEYWORD: Microsoft Teams

COMPANY: Slack

VENN 3.93 Bill Swavely

OVERVIEW

VENN 3.93 featured Mr. Bill Swavely, CIO of Pharm-Olam, an international contract research organization, specializing in clinical trials for Pharma, Biotech and MedTech organizations. The interview ranged in topics from budget prioritization, data architecture, analytics and reporting, identity access, file sharing and collaboration tools, and email security.

Click to view/download:

TRANSCRIPT ABSTRACT FULL RECORDING EVENT DECK

VIEW 1 SNIPPET RESULT

Microsoft Teams

And kind of more consolidated to using Microsoft Teams as our overall collaboration platform for a bunch of reasons.

remote people. It also provided us a great way to give a very productive work environment for our home office users. And there's so many things they brought to the table in that vein. One is, again, since most of our application infrastructure is software as a service, and that includes Medidata and some other legacy applications, the most important part is that they have the tools that can easily access these environments and provide a robust and bandwidth-capable access to these systems. And that's probably, first and foremost, one of the things that we try to manage and make sure happens.

The second thing is, when you have remote people all over the world, a big part of that is really making sure that you have a collaborative environment to truly make it so people feel like they're in the middle of a company, and not islands in these remote locations. And we're kind of, I'd say, we're somewhat earlier adopters. But when we came in, the company was primarily on Skype for Business under Microsoft. We had a voice over IP phone system with bridging. We had a bunch of other tools that people would use for chatting and other pieces. And kind of more consolidated to using Microsoft Teams as our overall collaboration platform for a bunch of reasons.

One is, Microsoft obviously took a lot of hints from Slack and created a very similar workspace. But now, that's combined with Microsoft's Office 365 architecture, which just kind of let them out-Slack Slack, in my opinion, with some of the tools they had. And then, being able to really introduce a more robust virtual room capability, where people from various countries who all work together on the same team can video chat, can share documents, can co-author documentations together - Excel, PowerPoint, Word, et cetera - flawlessly, from any device, in any location, securely and with data governance. It's really been a big help for us.

We kind of decided to make that our sole collaboration component and actually, in some cases, turn off or remove access to other tools to give really a more rich experience, make them feel more of a global team architecture than just individual islands at locations.

Erik Bradley

Bill, you did such a great job answering that, that you actually answered, I think, the next two questions we had, as well. It's kind of going into the identity access point of your distributed network, and also the ability to use productivity apps and conferencing and chatting to create that virtualized effort. We're going to go maybe a touch deeper on those areas, though. Particularly let's go back to security and start there.

[1] VENN Transcript Search allows users to quickly find the most relevant qualitative commentary on hundreds of technologies and companies

[2] Enter keyword(s) to find specific mentions

[3] Filter to VENN events that specifically mention a technology company

[4] Browse through each search result to jump directly to the passage within the transcript

# ETR+ NAVIGATION ETS + TSIS DATA VISUALIZATION DASHBOARDS

The screenshot displays the ETR+ dashboard interface. On the left is a dark blue navigation sidebar with the ETR+ logo and menu items: HOME, NEWSLETTER, MARKETPLACE, MY REPORTS, VENN, ETS DATA, TSIS DATA (highlighted), OVERVIEW, MODELS, ANALYSES, FORECASTS, DRILL DOWNS, and RESEARCH COVERAGE. Below these are links for User Journey Guide, Terms of Use, Privacy Policy, and Help.

The main dashboard area features a search bar at the top with the text "Search the Marketplace...". Below it are several filter tabs: Market Position, Current Spend Trajectory, Time Series, Idea Generator, Market Share, Reasoning, and a highlighted "2" tab. On the right, there is a "User Journey" dropdown with a highlighted "4" tab, and buttons for "Add to Favorites" and a share icon.

The central visualization is a scatter plot titled "Sector Net Scores" for "JUL19". The y-axis represents "Net Score" from -40% to 100%, and the x-axis represents "Market Share" from 0% to 100%. Data points are labeled with company names such as Atlassian, Elastic, AWS, Microsoft, Google, SAP, Oracle, IBM, and others. A large "JUL19" watermark is overlaid on the plot.

To the right of the scatter plot is a "Sector Net Scores" bar chart showing scores for various months: JUL19 (34%), APR19 (36%), JAN19 (36%), OCT18 (32%), JUL18 (34%), APR18 (34%), JAN18 (35%), OCT17 (33%), JUL17 (35%), APR17 (38%), and JAN17 (41%).

Below the bar chart is a "Public Cloud Ratings" pie chart with a red section labeled "Negative" and a green section labeled "Positive".

At the bottom of the dashboard are several filter sections: "1. Sector" (a list of categories with checkboxes), "2. Cut" (a dropdown menu set to "All Respondents"), "3. Citation Filter" (checkboxes for ranges like 1-10, 11-20, etc.), "4. Survey Month" (checkboxes for JAN, APR, JUL, OCT), and "5. Survey Year" (checkboxes for years from 2010 to 2019). A highlighted "3" tab is positioned above these filters.

At the bottom right of the dashboard is the ETR+ logo with the tagline "an optiviti" and a chat icon.

[1] The TSIS Data and ETS Data menus house our data visualization dashboards. Use TSIS Data for spending intentions data and ETS Data for awareness and evaluations data.

[2] Dashboards are broken up by purpose

[3] Dashboards are further subdivided into pages

[4] Add a specific page to your Favorites for quicker access

Find more information about how to interpret these visualizations in the [TSIS Tutorial](#) and [ETS Tutorial](#).

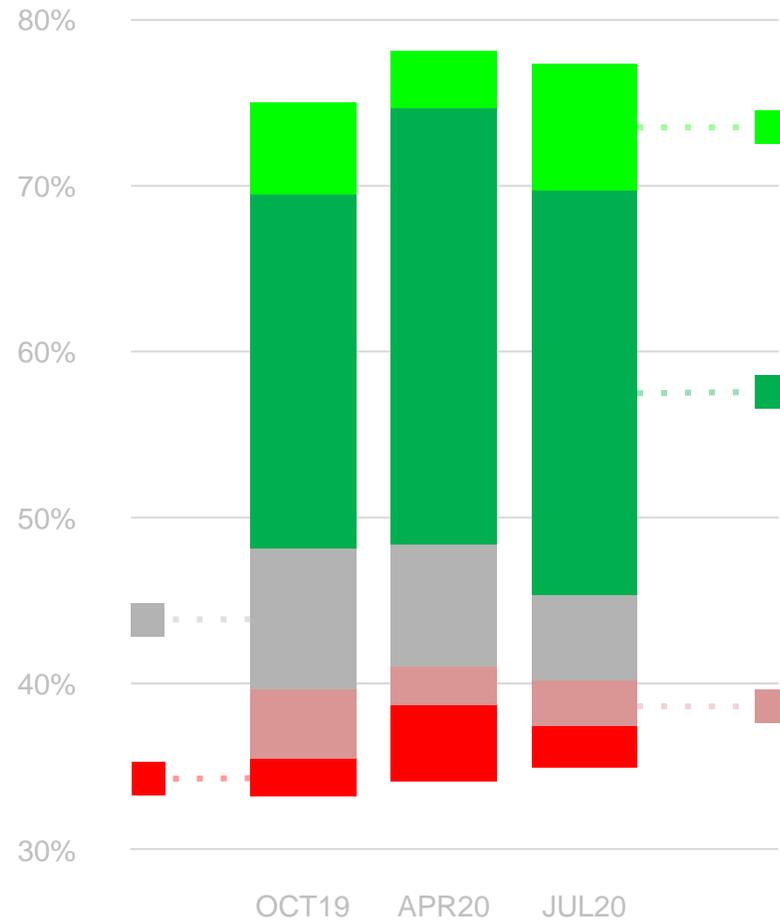
# TSIS TUTORIAL

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DEFINITIONS, METHODOLOGY AND HOW TO INTERPRET THE  
**TECHNOLOGY SPENDING INTENTIONS SURVEY** DATA IN THE TSIS  
DATA VISUALIZATION DASHBOARDS AND RESEARCH REPORTS

# TSIS RESEARCH SCOPE

TSIS – Technology Spending Intentions Survey



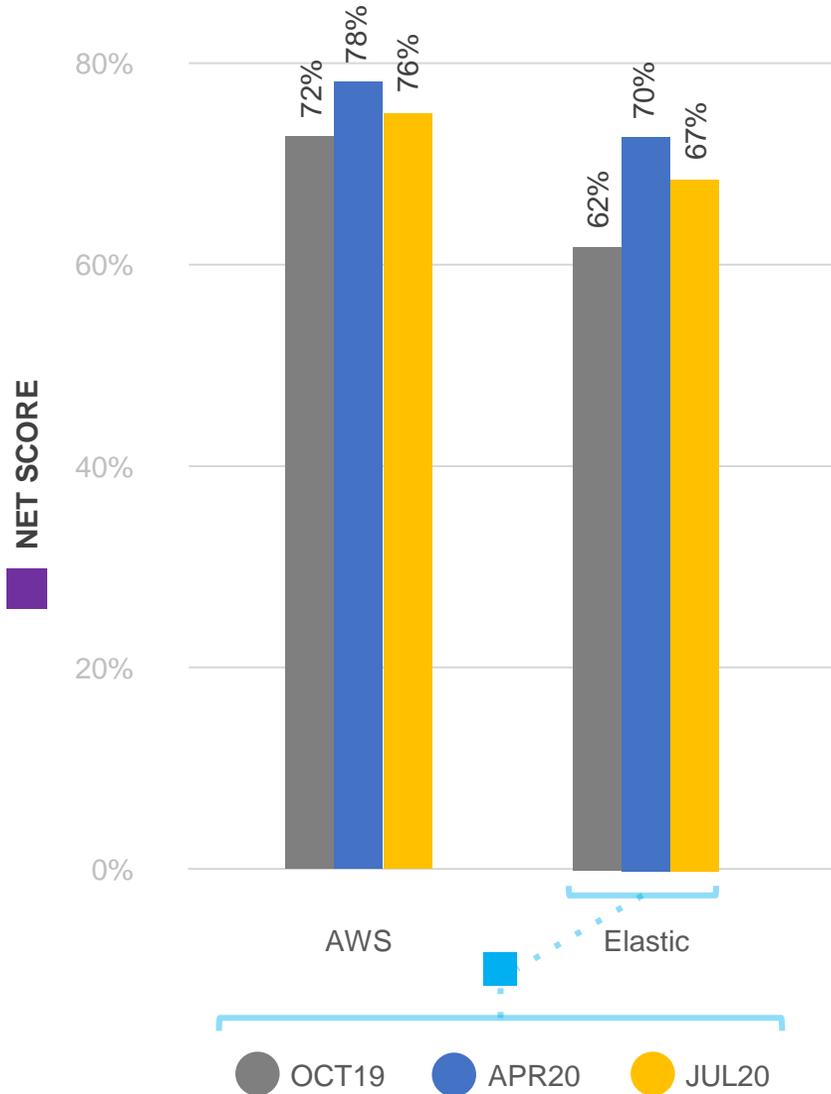
4 core surveys are conducted yearly –

- **January:** Survey respondents provide Calendar year 2020 spending intentions vs their actual 2019 spend.
- **April:** Survey respondents provide *updated* Calendar year 2020 spending intentions vs their actual 2019 spend.
- **July:** Survey respondents provide 2H20 spending intentions vs their actual 1H20 spend.
- **October:** Survey respondents provide *updated* 2H20 spending intentions vs their actual 1H20 spend.

In the July 2020 survey, respondents are asked to provide their **spending intentions** for a **vendor within a sector** based on the following standardized options:

- **ADOPTION:** IF the vendor will be a **new adoption to your organization** within that sector in 2H20 (not entirely new, but new to that sector).
- **INCREASE:** IF your organization plans an **increased spend** of +6% or greater with this vendor during 2H20 versus your organization's actual 1H20 spend with this vendor – within that particular sector.
- **FLAT:** IF your organization plans a **flat spend** [+5% to -5%] with this vendor during 2H20 versus your organization's actual 1H20 spend with this vendor – within that particular sector.
- **DECREASE:** IF your organization plans a **decreased spend** of -6% or worse with this vendor during 2H20 versus your organization's actual 1H20 spend with this vendor – within that particular sector.
- **REPLACING:** IF your organization intends to **replace, put in containment, remove or swap-out this vendor** during 2H20 – within that particular sector.
- **BLANK / UNANSWERED:** IF your organization **did not utilize the vendor** during 1H20 – nor has any plans to adopt the vendor in 2H20 – within that particular sector.

# TSIS KEY TERMS



## NET SCORE

Represents the intensity of spend for a vendor. Higher Net scores indicate a positive spend trajectory, while lower Net scores indicate a flat or negative spend trajectory.

$$\text{Net score} = [ \text{Adoption \%} + \text{Increase \%} ] - [ \text{Decrease \%} + \text{Replacing \%} ]$$

[\(Definitions of these terms\)](#)

## NET SCORE DELTA

Comparison of Net scores over two time periods. Positive deltas indicate customers plan to spend more now than previously indicated. Negative deltas indicate customers plan to spend less.

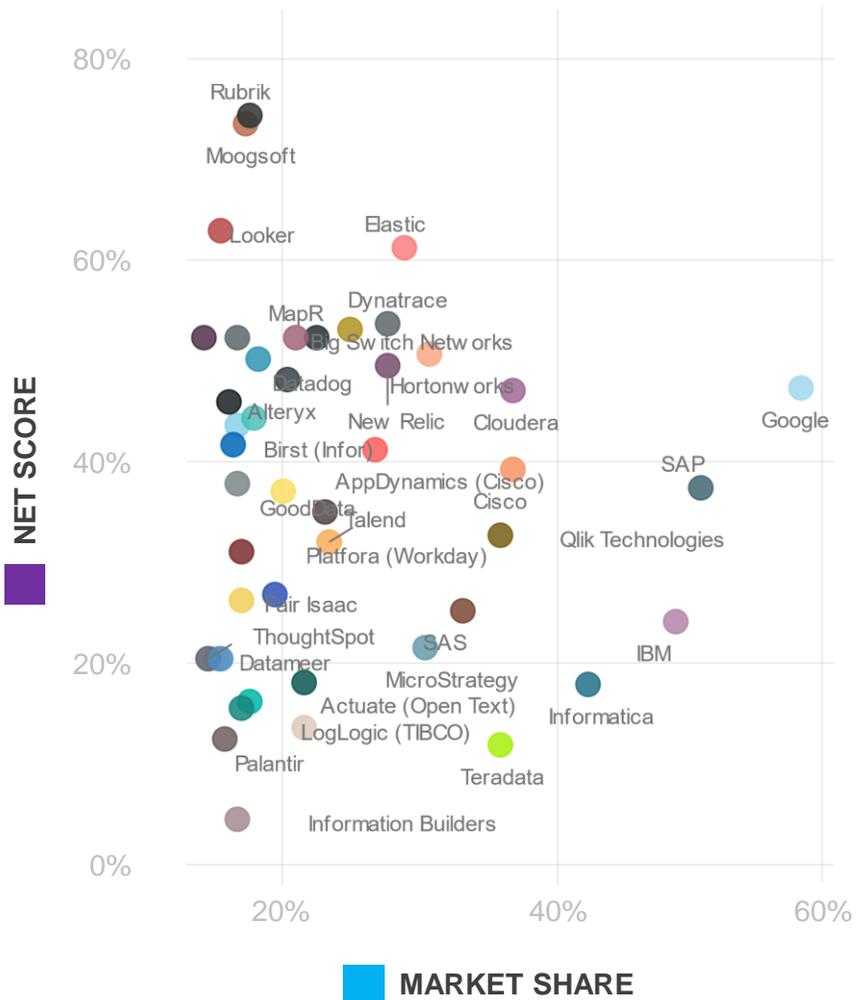
= Survey / Survey [ s / s ] : ● JUL20 vs ● APR20

= Year / Year [ y / y ] : ● JUL20 vs ● OCT19

# TSIS KEY TERMS

■ Cut

All Respondents



## NET SCORE

Represents the intensity of spend for a vendor. Higher Net scores indicate a positive spend trajectory, while lower Net scores indicate a flat or negative spend trajectory.

$$\text{Net score} = [ \text{Adoption \%} + \text{Increase \%} ] - [ \text{Decrease \%} + \text{Replacing \%} ]$$

[\(Definitions of these terms\)](#)

## CUT

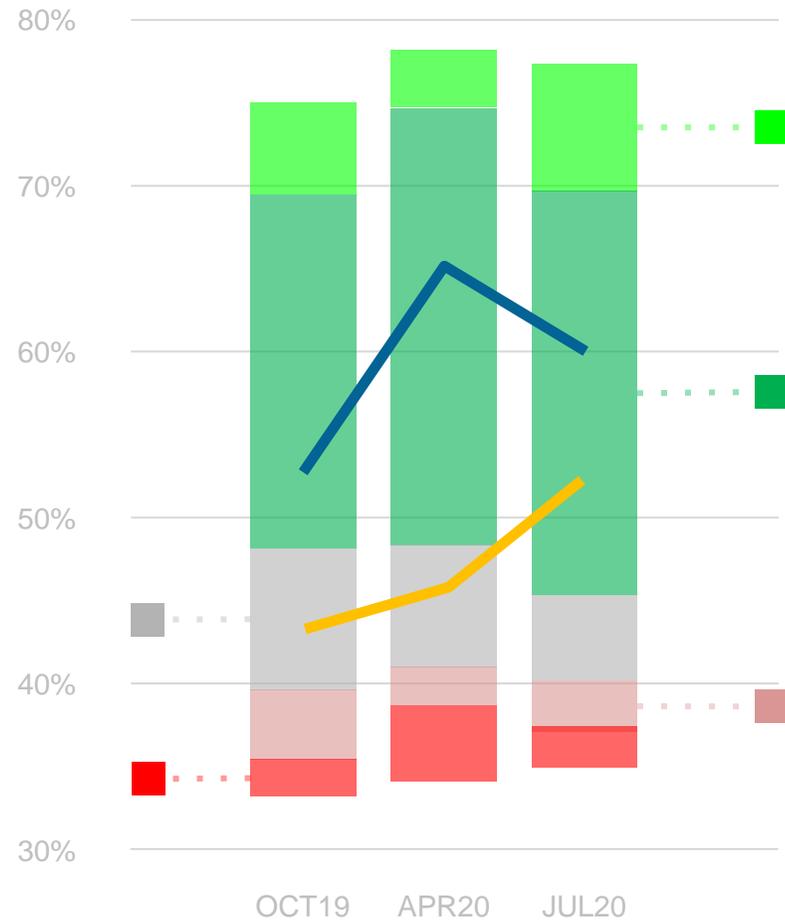
A filter to show data for a subsample of customers belonging to the same demographic attribute. Useful for isolating customers by vertical, region, enterprise size, etc.

## MARKET SHARE

Represents the overall enterprise pervasion within ETR's sample.

$$= [ \text{Vendor Citations excluding Replacements} ] \div [ \text{Sector Respondents} ]$$

# TSIS CITATION-WEIGHTED AVERAGE NET SCORE



## CITATION-WEIGHTED AVERAGE NET SCORE

A *citation-weighted Net score* is calculated as the average Net score across sectors weighted by citations received in each sector. **The weighted Net score puts a greater emphasis on a company's products that are more pervasive in the enterprise.**

For example, the citation-weighted Net score of Vendor XYZ across the following three sectors would be calculated by [1] multiplying Vendor XYZ's Net score within each sector by citations received in that sector, [2] summing these values, and [3] dividing by total citations received.

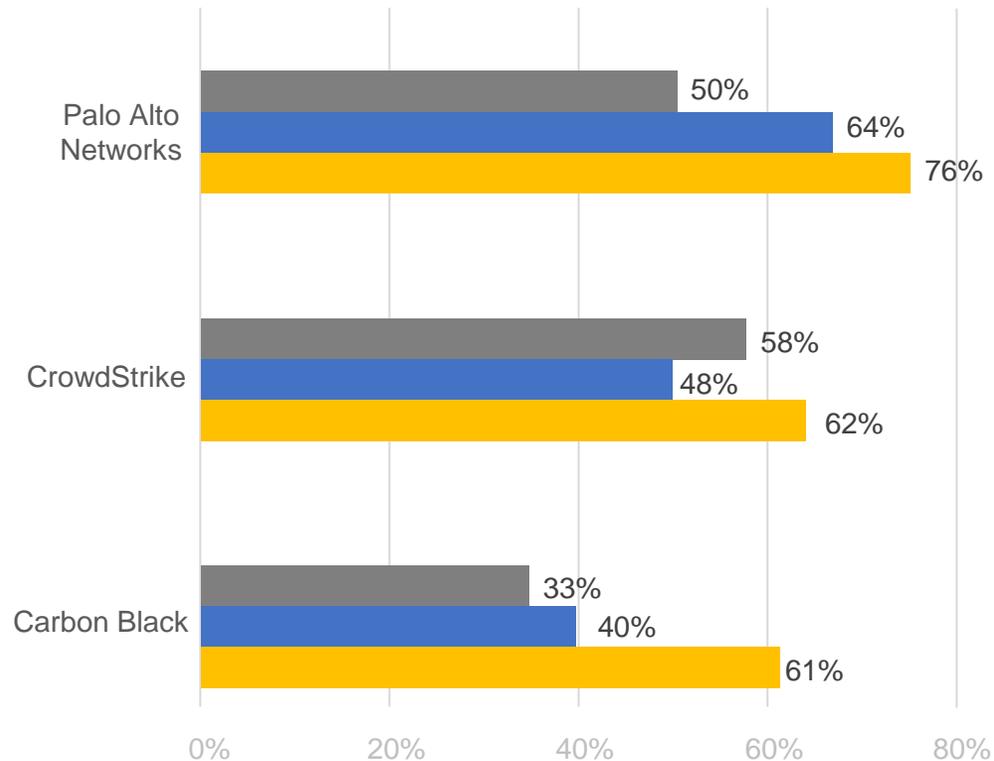
*Sector A: 50% Net score, 400 citations*  
*Sector B: 35% Net score, 120 citations*  
*Sector C: 30% Net score, 100 citations*

$$\text{Citation-weighted Net score} = \frac{[50\% * 400] + [35\% * 120] + [30\% * 100]}{(400 + 120 + 100)} = 43.9\%$$

The following metrics are similarly calculated using a citation-weighted average: **Market Share**, **Adoption %**, **Increase %**, Flat %, **Decrease %** and **Replacing %**.

# TSIS COMPETITIVE ANALYSIS IN SHARED ACCOUNTS

In Vendor XYZ's accounts...



■ SHARED NET SCORE

● OCT19   ● APR20   ● JUL20

## SHARED ACCOUNTS

ETR aggregates customer overlap (shared accounts) between vendors to determine how spend is flowing between competitors (e.g., as a customer adopts a new vendor, which competitor(s) will they place in containment). This competitive analysis allows users to see which competitors a vendor is gaining share from or losing share to.

## ■ SHARED NET SCORE

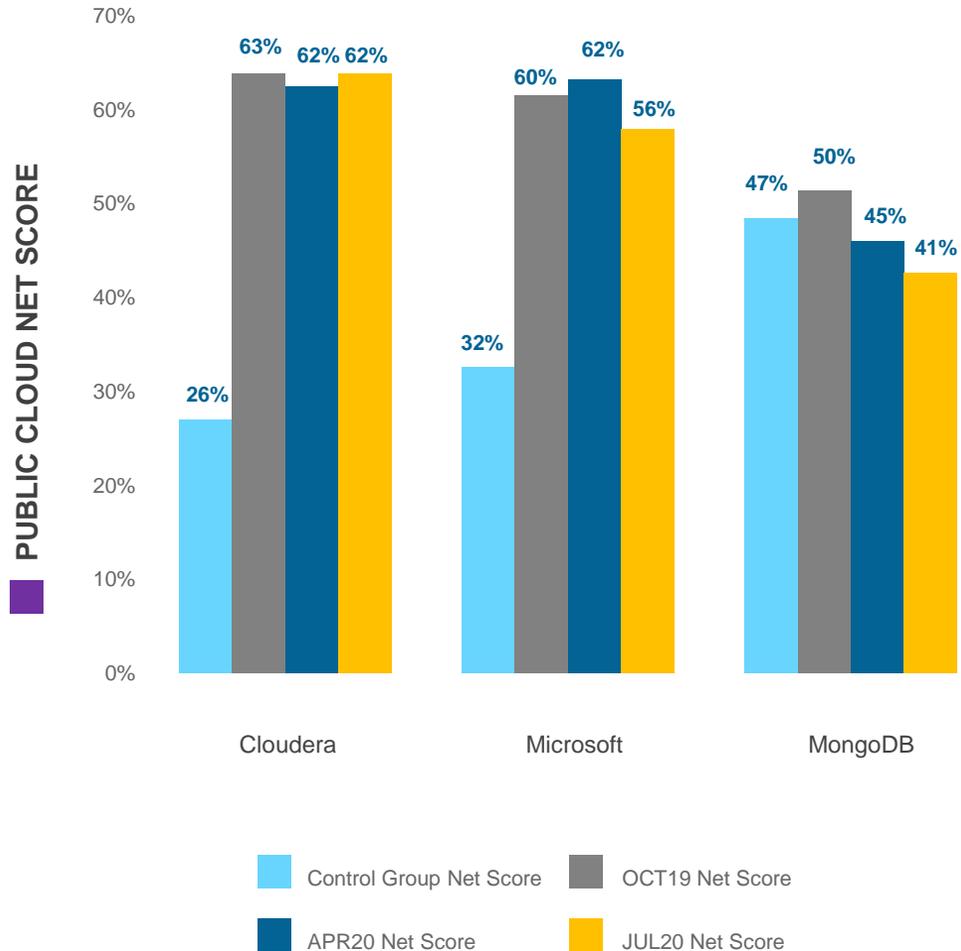
Represents the intensity of spend for a vendor within shared customer accounts. Higher Net scores indicate a positive spend trajectory, while lower Net scores indicate a flat or negative spend trajectory.

**Net score = [ Adoption % + Increase % ] – [ Decrease % + Replacing % ]**  
([Definitions of these terms](#))

## SHARED N / SHARED MARKET SHARE

The count (N) and proportion (market share) of overlapping customers between two vendors.

# TSIS PUBLIC CLOUD CORRELATION



## PUBLIC CLOUD CORRELATION

ETR determines the spend trajectory for vendors among customers that are simultaneously accelerating spend (Adopting or Increasing) with Public Cloud (AWS, Microsoft Azure and/or Google Cloud Platform). Vendors are then assigned a Public Cloud Rating on whether the vendor is Positively-aligned or Negatively-aligned to Public Cloud pervasion.

## PUBLIC CLOUD NET SCORE

Represents the intensity of spend for a vendor within accounts accelerating on Public Cloud spend. Higher Net scores indicate a positive spend trajectory, while lower Net scores indicate a flat or negative spend trajectory.

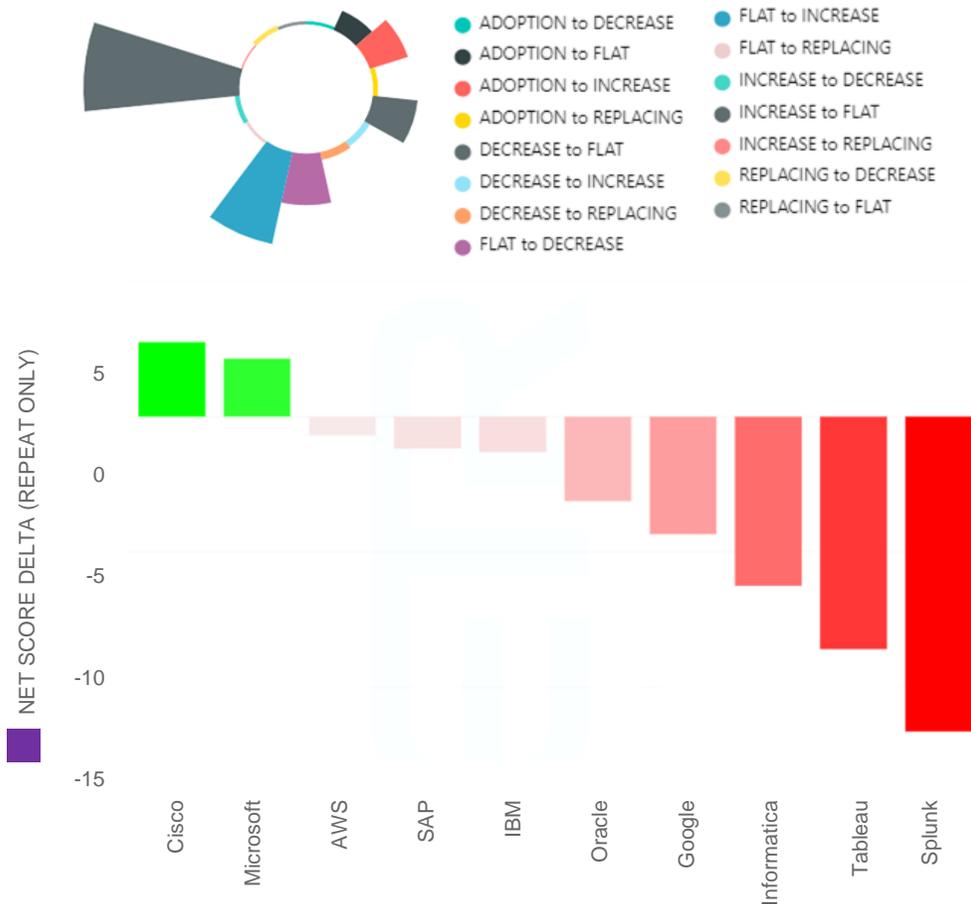
$$\text{Net score} = [ \text{Adoption \%} + \text{Increase \%} ] - [ \text{Decrease \%} + \text{Replacing \%} ]$$

[\(Definitions of these terms\)](#)

## CONTROL GROUP NET SCORE

A vendor's Net score calculated among customers that are NOT accelerating Public Cloud spend (customer is either decelerating on Public Cloud spend or did not cite a Public Cloud vendor).

# TSIS CHANGE IN SPEND INDICATIONS



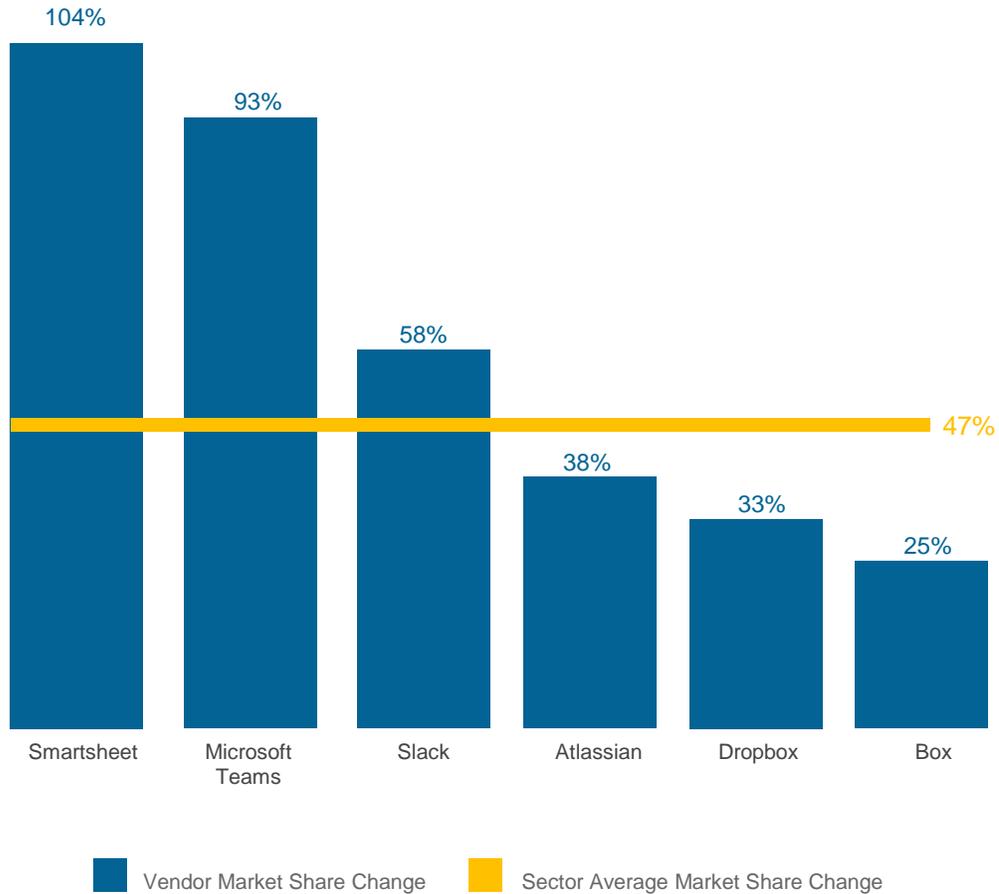
## CHANGE IN SPEND INDICATIONS

In order to understand how each vendor has been impacted in the last 3 months (and the magnitude), ETR isolates to repeat respondents who indicated a spending intention for the vendor both in APR20 and JUL20.

Changes in spend indications are aggregated as a percentage of repeat indications to determine the effect that the change in spend will have on the vendor's Net score, and to determine which type of change is occurring the most frequently (e.g., revising an *'Increase'* indication to *'Flat'*)

Vendors are ranked to determine which vendors are seeing the largest near-term inflection, positively or negatively.

## TSIS CUSTOMER GROWTH



### CUSTOMER GROWTH (VENDOR MARKET SHARE CHANGE)

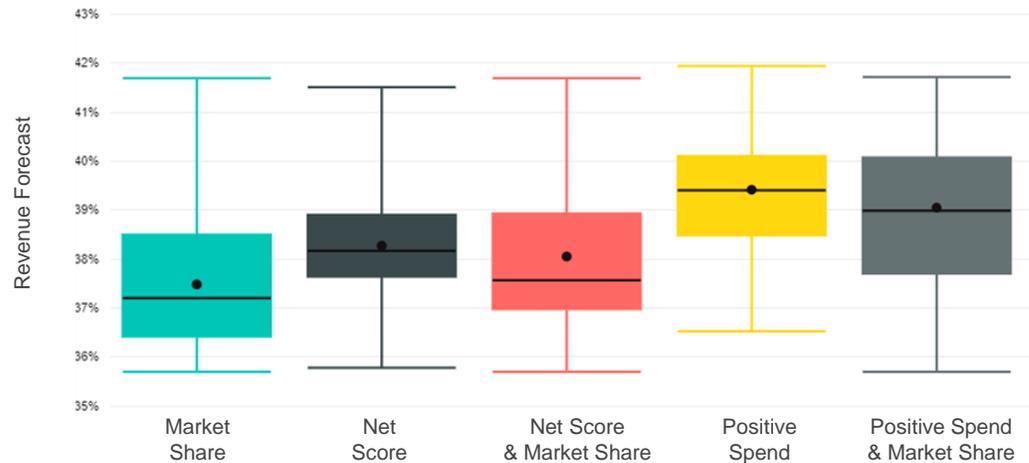
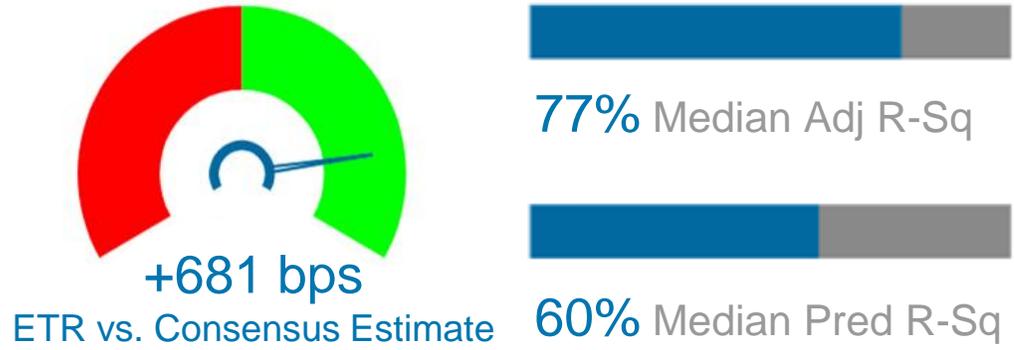
ETR calculates the change in customer citations vs 12 months prior in order to measure customer growth. Vendors are ranked by who has grown their user base the most in our sample over the past year.

Customer citations include all spending intentions, including negative spending intentions.

### SECTOR AVERAGE MARKET SHARE CHANGE

The citation-weighted average is calculated for each sector as a benchmark of customer growth as a sector.

# TSIS REGRESSION-BASED FORECASTS



## REGRESSION-BASED FORECASTS

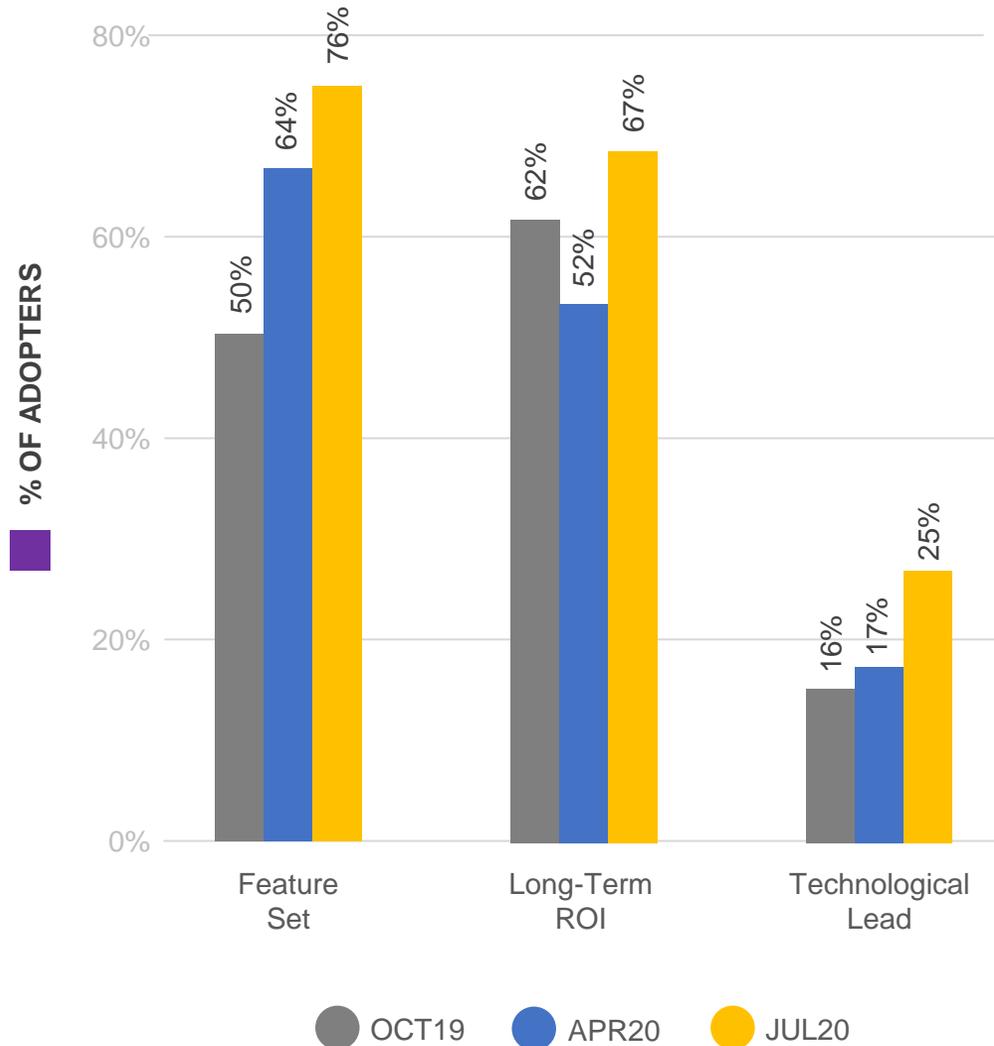
ETR modeled the relationship between survey data and a vendor's performance by fitting a linear equation to observed data.

Users can filter the results based on regressions coming from specific sectors, products, customer subsamples, independent variables, long-term or short-term relationships, and using Adjusted R-squared thresholds.

ETR's median forecast is benchmarked against the consensus estimate to determine the direction and magnitude of arbitrage.

Survey data is regressed onto a vendor's [1] Revenue, [2] License/Product Revenue, [3] Subscription Revenue, [4] Services/Support/Maintenance Revenue, and [5] Billings, dependent on the availability of reported financial data.

# TSIS ADOPTION / REPLACEMENT REASONING



## ADOPTION / REPLACEMENT REASONING

ETR drills down into the primary factors driving customers to Adopt or Replace a vendor.

Reasoning can be viewed in the context of historical levels to see trends and inflections as certain reasons become more or less dominant, or can be compared between vendors to differentiate the edge that a vendor may have over a competitor.

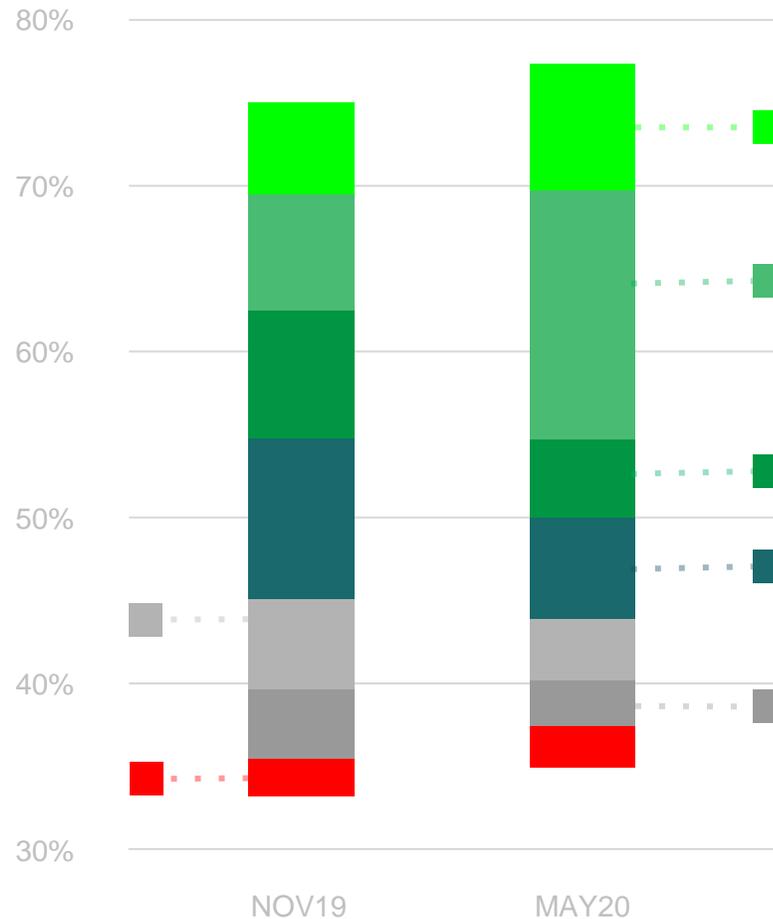
# ETS TUTORIAL

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DEFINITIONS, METHODOLOGY AND HOW TO INTERPRET THE  
**EMERGING TECHNOLOGY STUDY** DATA IN THE ETS DATA  
VISUALIZATION DASHBOARDS AND RESEARCH REPORTS

# ETS RESEARCH SCOPE

ETS – Emerging Technology Study



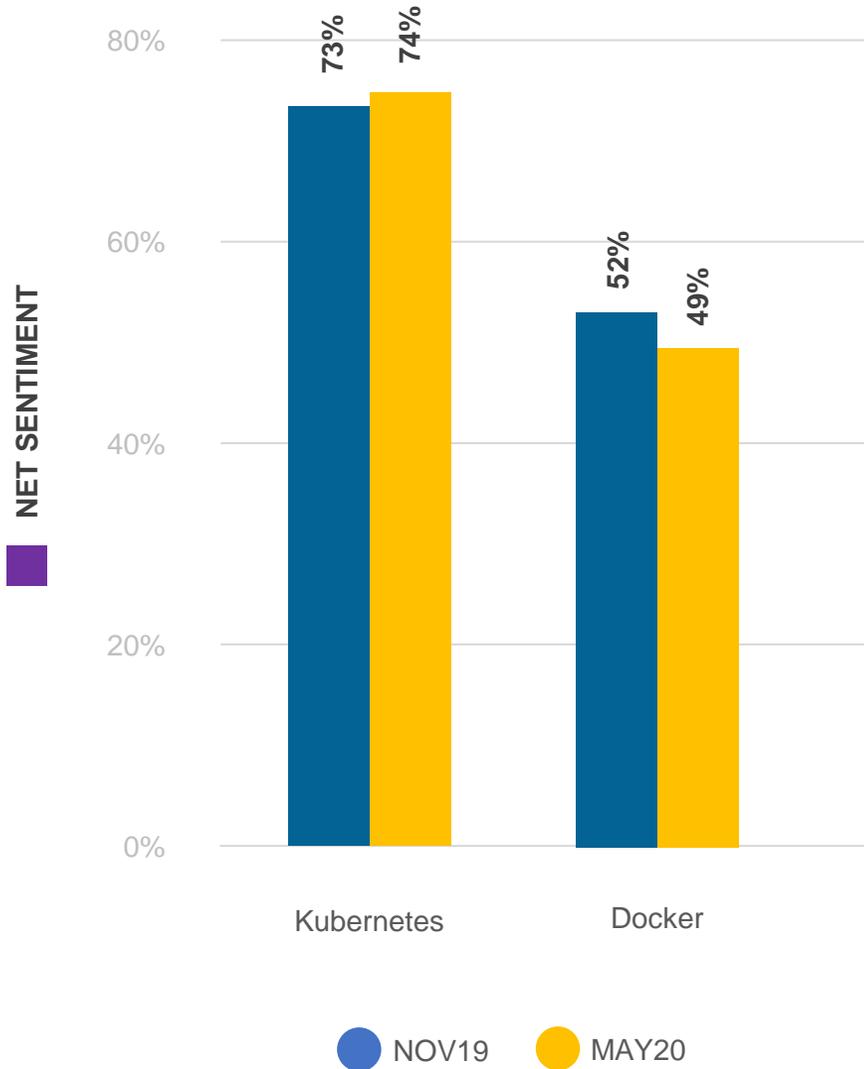
2 surveys are conducted yearly –

- **November & May:** For each emerging technology listed, survey respondents provide awareness levels, evaluation intentions, plans to utilize or not utilize, as well as plans to allocate further or replace.

Respondents were asked to select one of the following standardized options for a vendor, within a sector:

- **PLAN TO EVALUATE:** If your organization plans to evaluate or perform a proof of concept (POC) with the vendor approximately within the next 6 months.
- **CURRENTLY EVALUATING:** If your organization is currently evaluating or performing a proof of concept (POC) with the vendor.
- **EVALUATED AND PLAN TO UTILIZE:** If your organization decided to move forward with the vendor in any manner after evaluating or performing a proof of concept (POC).
- **ALLOCATING FURTHER POST ADOPTION:** If your organization has already adopted and plans to roll out more broadly.
- **AWARE OF BUT NO PLAN TO EVALUATE:** If you're aware of the vendor and your organization has no plans to evaluate or perform a proof of concept (POC).
- **EVALUATED AND DO NOT PLAN TO UTILIZE:** If your organization decided NOT to move forward with the vendor in any manner after evaluating or performing a proof of concept (POC).
- **REPLACED OR IN CONTAINMENT:** If your organization has replaced or has placed in containment with the intent to replace the vendor in the future (does NOT include pilots or POCs).
- **BLANK / UNANSWERED:** If you're UNaware of the vendor and your organization has no plans to evaluate or perform a proof of concept (POC).

## ETS RESEARCH SCOPE



### NET SENTIMENT

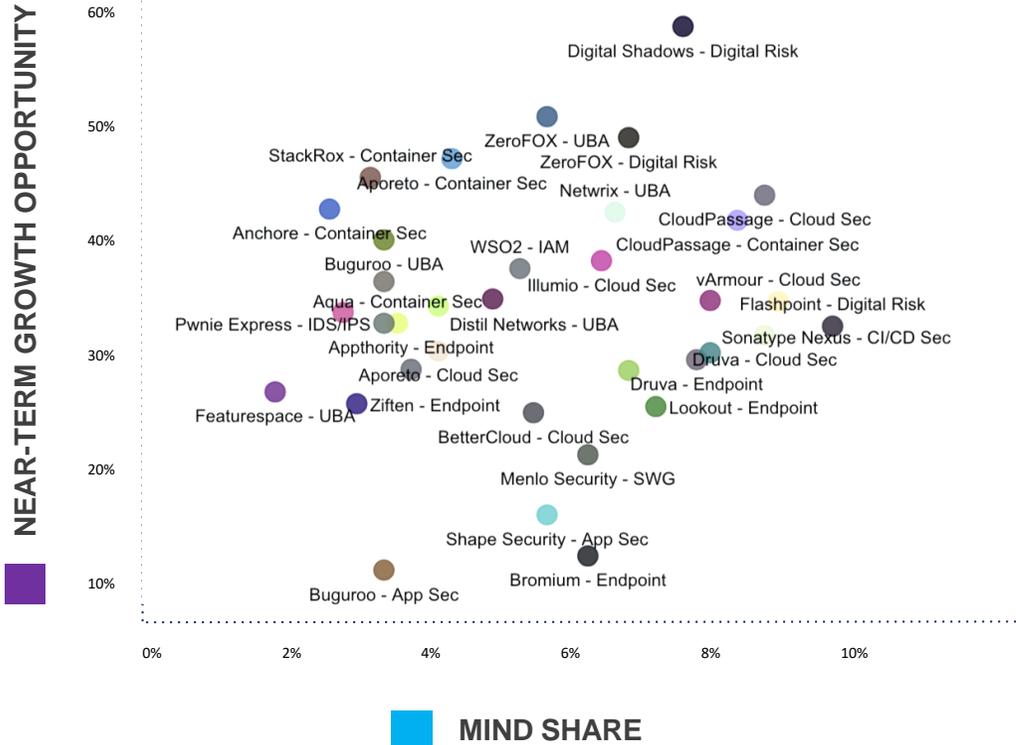
Net Sentiment combines almost all of our survey answer options to determine overall opportunity for a vendor or sector. **This metric aggregates customer awareness, evaluations, utilization, adoptions, and replacements.**

**Net Sentiment = [Plan to Evaluate within 6 months + Currently Evaluating + Evaluated, Plan to Utilize + Allocating Further] - [Evaluated, No Plan to Utilize + Replaced or In Containment]**

# ETS RESEARCH SCOPE

**Cut**

All Respondents



## NEAR-TERM GROWTH OPPORTUNITY

This metric combines positive survey answer options to determine near-term customer growth opportunity. **This metric looks at customer evaluations, utilization, and adoptions.**

$$\text{Near-Term Growth Opportunity} = [\text{Plan to Evaluate within 6 months} + \text{Currently Evaluating} + \text{Evaluated, Plan to Utilize} + \text{Allocating Further}]$$

## CUT

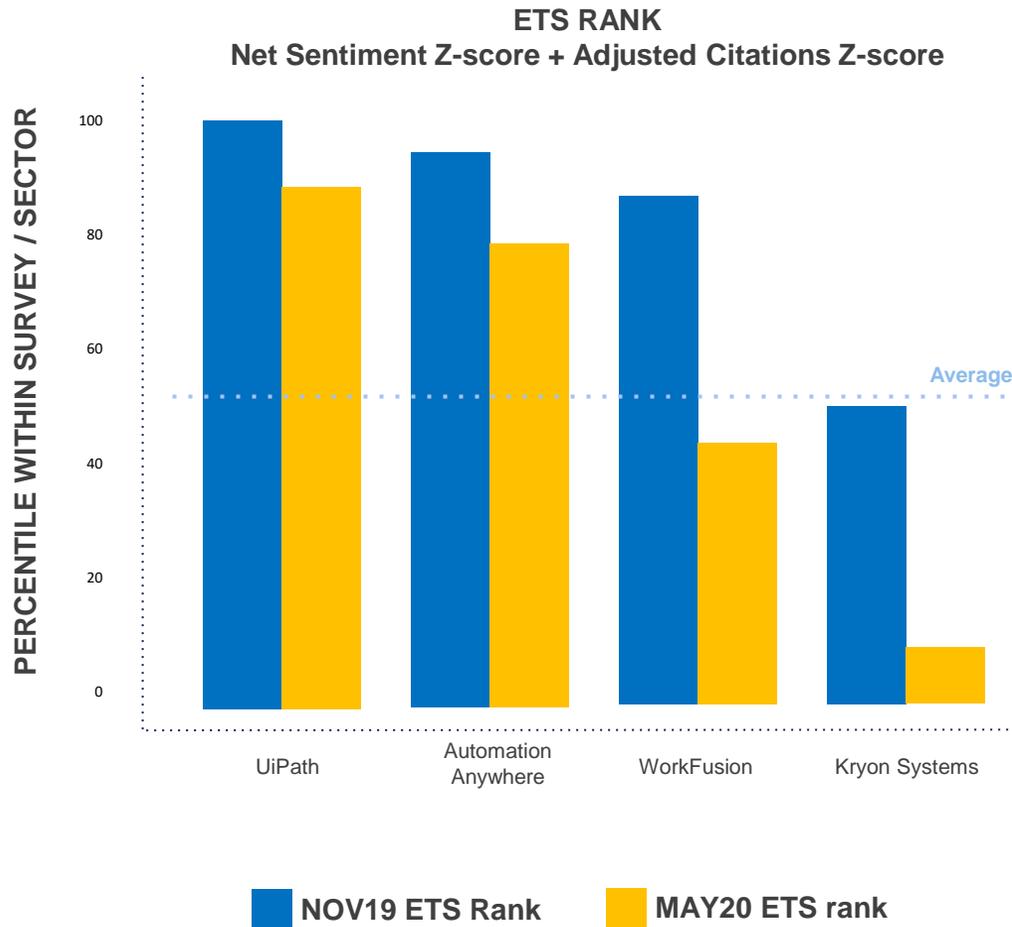
A filter to show data for a subsample of customers belonging to the same demographic attribute. Useful for isolating customers by vertical, region, enterprise size, etc.

## MIND SHARE

Represents the overall enterprise pervasion within ETR's sample.

$$\text{Mind Share} = \frac{[\text{Aware of, No Plan to Evaluate} + \text{Plan to Evaluate within 6 months} + \text{Currently Evaluating} + \text{Evaluated, Plan to Utilize} + \text{Allocating Further}]}{[\text{Unique Sector Customer Count}]}$$

# ETS RANK



## ETS RANK

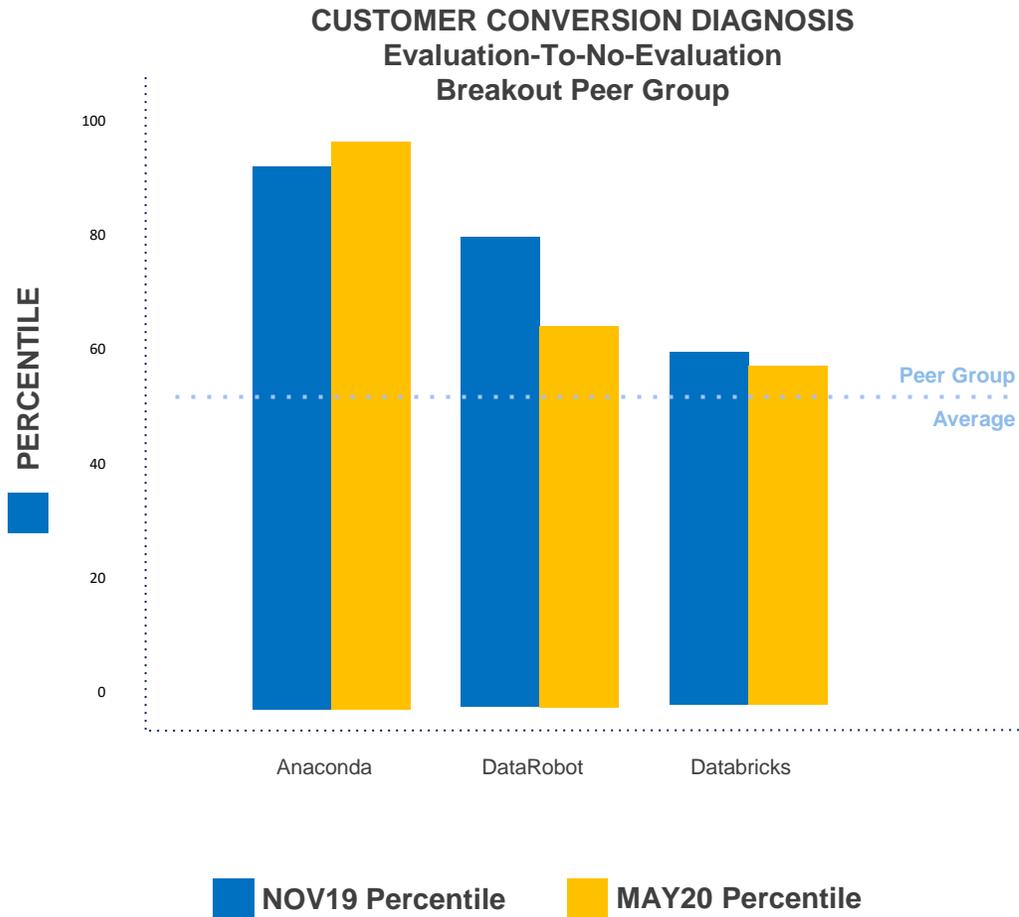
All company datasets are standardized (using z-scores) and ranked, by percentile, based on Net Sentiment and headcount. Creating a standardized ranking allows users to compare vendors across different sectors and evaluate vendors in the context of the entire enterprise technology landscape.

Vendors with the most positive sentiment and the widest pervasion within the minds of IT Leadership are ranked in the highest percentiles, while vendors with poor sentiment and limited pervasion are ranked lower.

A vendor ranking significantly higher within the entire survey than within the specific sector indicates that the vendor exists within a high-performing sector, where the majority of the vendors within the sector are outperformers relative to the larger emerging technology landscape.

A second set of rankings is also determined based on Near-Term Growth Opportunity and headcount.

# ETS ENTERPRISE CUSTOMER CONVERSION DIAGNOSIS



## CUSTOMER CONVERSION METRIC RANKINGS, e.g., Evaluation-to-No-Evaluation

Peer Groups were created by grouping vendors within comparable citation ranges into four equally-sized buckets: POC, Innovator, Scaling and Breakout. Please note Peer Groups may not necessarily constitute direct competitors within the same sector, but are instead intended to group vendors with similar scale and market penetration.

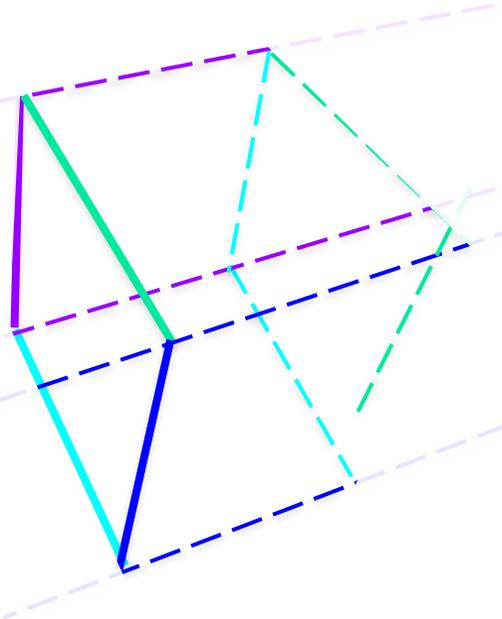
Percentile rankings were computed for every customer conversion metric within each Peer Group.

Full list of ETS metrics [here](#).

# ETS CUSTOMER DRIVEN METRICS



**360°**  
**Performance Breakdown**  
Tracking baseline metrics has proven insufficient to measure or predict vendor performance.

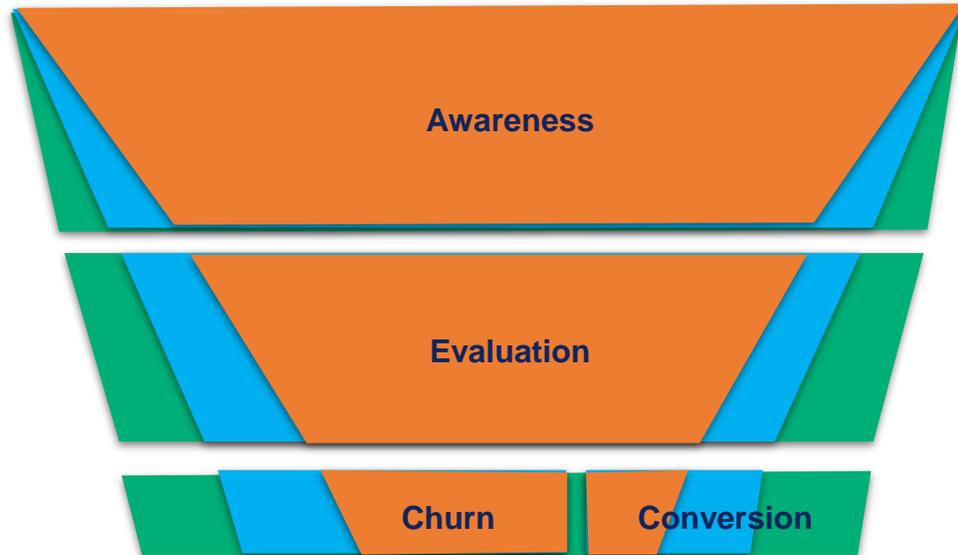


## Enterprise Customer Driven Metrics

- Near-Term Growth Opportunity** = [Plan to Evaluate within 6 months + Currently Evaluating + Evaluated, Plan to Utilize + Allocating Further]. This metric combines positive survey answer options to determine near-term customer growth opportunity. This metric looks at customer evaluations, utilization, and adoptions.
- Evaluation-To-Utilization** = [Plan to Evaluate within 6 months + Currently Evaluating] / [Evaluated, Plan to Utilize + Allocating Further]. Evaluation-To-Utilization is a ratio of a vendor's near-term customer pipeline to their existing customer base. This ratio should be interpreted as a vendor's potential to accelerate customer headcount.
- Mind Share** = [Aware of, No Plan to Evaluate + Plan to Evaluate within 6 months + Currently Evaluating + Evaluated, Plan to Utilize + Allocating Further] / [Unique Sector Customer Count]. This percentage should be interpreted as the company's pervasion within enterprises and the minds of IT Decision Makers versus peers.
- Net Sentiment** = [Plan to Evaluate within 6 months + Currently Evaluating + Evaluated, Plan to Utilize + Allocating Further] - [Evaluated, No Plan to Utilize + Replaced or In Containment]. This metric combines almost all of our survey answer options to determine overall opportunity, traction, as well back out any customer negativity. This metric aggregates customer awareness, evaluations, utilization, adoptions, and replacements.
- Evaluation-To-No-Evaluation** = [Plan to Evaluate within 6 months + Currently Evaluating] / [Aware of, No Plan to Evaluate]. Evaluation-To-No-Evaluation is a ratio of customers evaluating to those that are aware of the vendor and have decided not to evaluate. This ratio should be interpreted as a vendor's ability to convert awareness into evaluations.
- Conversion-To-Churn** = [Evaluated, Plan to Utilize + Allocating Further] / [Evaluated, No Plan to Utilize + Replaced or In Containment]. Conversion-To-Churn is a ratio of a vendor's existing customers to those that have walked away. This ratio should be interpreted as a vendor's ability to retain customers post evaluation.
- Churn-To-Evaluation** = [Evaluated, No Plan to Utilize + Replaced or In Containment] / [Plan to Evaluate within 6 months + Currently Evaluating]. Churn-To-Evaluation is a ratio of customers who have walked away vs potential customers. This ratio can be interpreted as whether a vendor is losing customers faster than their pipeline is bringing in potential customers.

# ETS PIPELINE HEALTH

## Pipeline Performance Brackets



1st - 49th percentile

50 - 74th percentile

75th - 99th percentile



## ETS SALES PIPELINE DIAGNOSTICS: PROSPECT, QUALIFY, CLOSE, RETAIN

Metrics should be viewed holistically to determine which aspect(s) of sales and marketing are performing above and below average. We use three metrics from the prior slide to visually demonstrate our capability in dissecting the sales funnel for strengths and weaknesses. This type of analysis can be performed on all 300+ Emerging Technology Study datasets.

### Evaluation-To-No-Evaluation

This ratio should be interpreted as *a vendor's ability to convert awareness into evaluations*

### Evaluation-To-Utilization

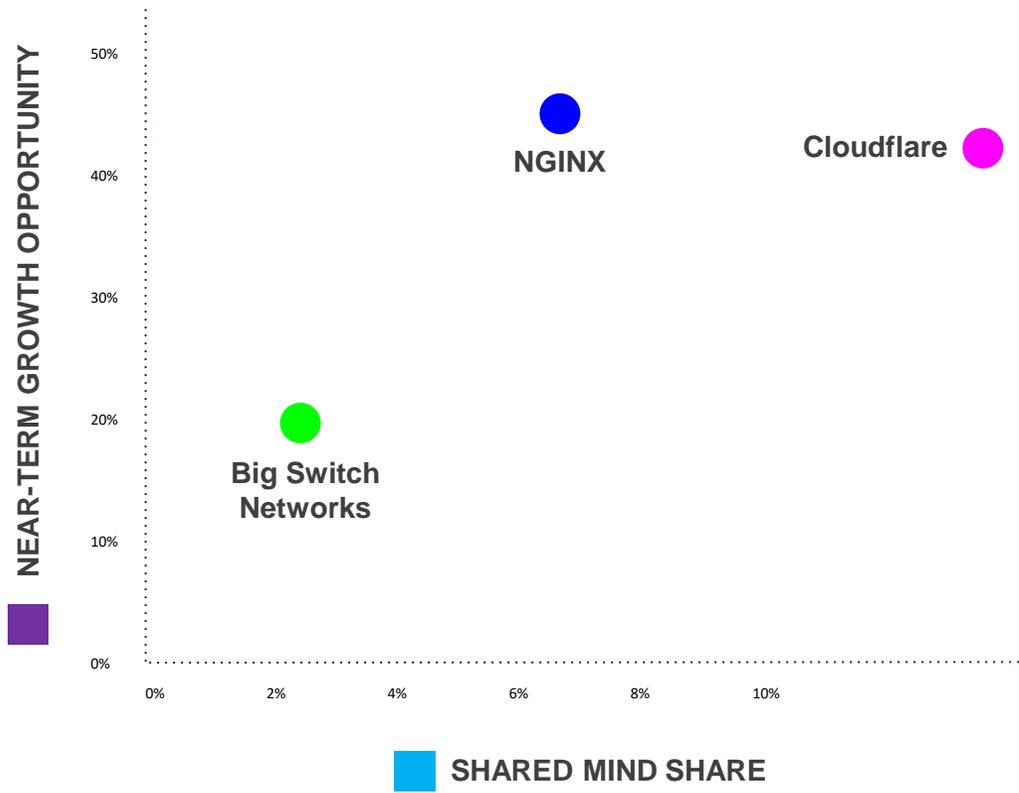
This ratio should be interpreted as *a vendor's potential to accelerate customer headcount*

### Conversion-To-Churn

This ratio should be interpreted as *a vendor's ability to retain customers post evaluation*

# ETS + TSIS RESEARCH OVERLAY

TARGETS & DISRUPTORS  
F5 Networks' Accounts in the Networking Sector



## TARGETS & DISRUPTORS

ETR is able to overlap spending intentions captured in the TSIS with awareness and evaluation levels captured in the ETS. Doing so allows users to see which emerging technology vendors have the highest Near-Term Growth Opportunity and largest Mind Shares within a more established vendor's user base.

### NEAR-TERM GROWTH OPPORTUNITY

This metric combines positive survey answer options to determine near-term customer growth opportunity in the selected vendor's accounts. **This metric looks at customer evaluations, utilization, and adoptions.**

$$\text{Near-Term Growth Opportunity} = [\text{Plan to Evaluate within 6 months} + \text{Currently Evaluating} + \text{Evaluated, Plan to Utilize} + \text{Allocating Further}]$$

### SHARED MIND SHARE

Represents the overall enterprise pervasion within the selected vendor's accounts.

$$\text{Shared Mind Share} = [\text{Shared Citations}^*] / [\text{Shared N}]$$

\*Citations have been adjusted to exclude 'Aware of, No Plan to Evaluate' indications

# VENN, THE STORIES BEHIND THE DATA

“We’ve been in ServiceNow for a few years and it’s a pretty critical piece of our IT infrastructure. We’re actually writing applications in their framework and integrating everything we can into ServiceNow...our job automation software, our monitoring software, all of that integrates directly into ServiceNow for instant creation.”

**Manager IT Datacenter, Retail/Consumer, Large Organization, North America | VENN 3.57, 9/20/2018**

“We brought in Splunk and replaced LogRhythm, so we’re using Splunk to dashboard all of the things that are coming out of our data lake. We’re really dumping all of our security data into a Hadoop instance in the private cloud. We’re using Kafka to pull that data out and aggregate it, so we’re dumping that to Splunk. That’s all net-new; LogRhythm is gone.”

**Cybersecurity Architect, Industrials/Materials/Manu., Global 1000 Organization, North America | VENN 3.66, 11/13/2018**

“Tableau has been a really nice as a standalone system in itself because it’s fairly easy to implement but there’s still a learning curve associated with it because it is unique in terms of how it presents the data. Whereas Power BI has gained space primarily because it is leveraging general Microsoft Office understanding of spreadsheet knowledge.”

**Sr. Director, Enterprise Performance Excellence, Energy/Utilities, Fortune 1000 Organization, North America | VENN 3.68, 11/20/2018**



AN EVENTS + CONTENT PLATFORM BY ETR

## VENN COMMENTARY

CIO commentary from VENN events is aggregated to provide further qualitative color to the trends captured in the data.

# Disclosure

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# apptiviti

opinions **only exist due to a lack of data.**

360° due  
diligence  
platform