Global Business Information Trends and the IT Industry

October 2008

Background

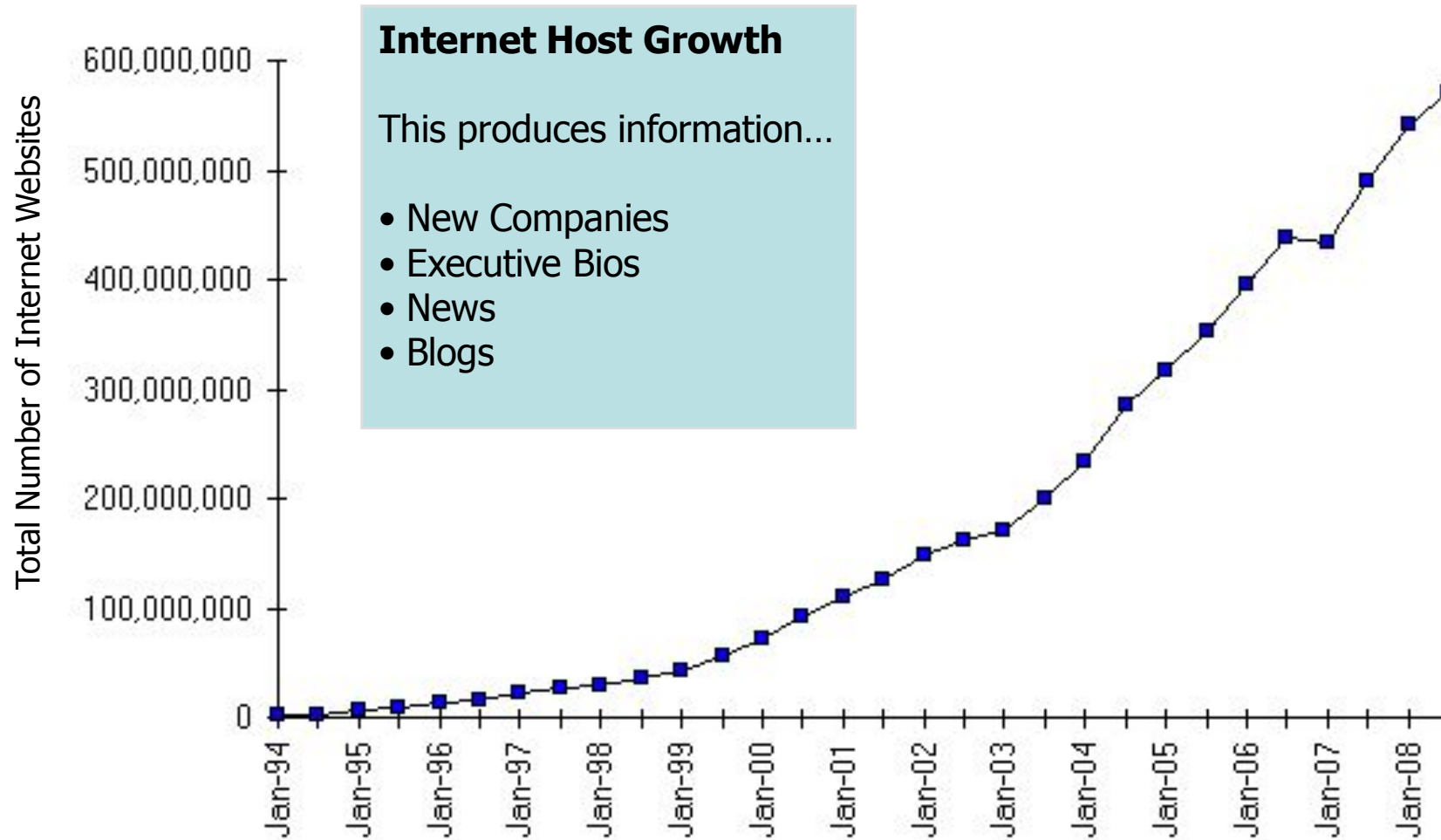## Global Business Information Trends and the IT Industry

Sham Sao
CMO, OneSouce Information Services

Mr. Sao has world-wide responsibility for marketing and strategy at OneSource.

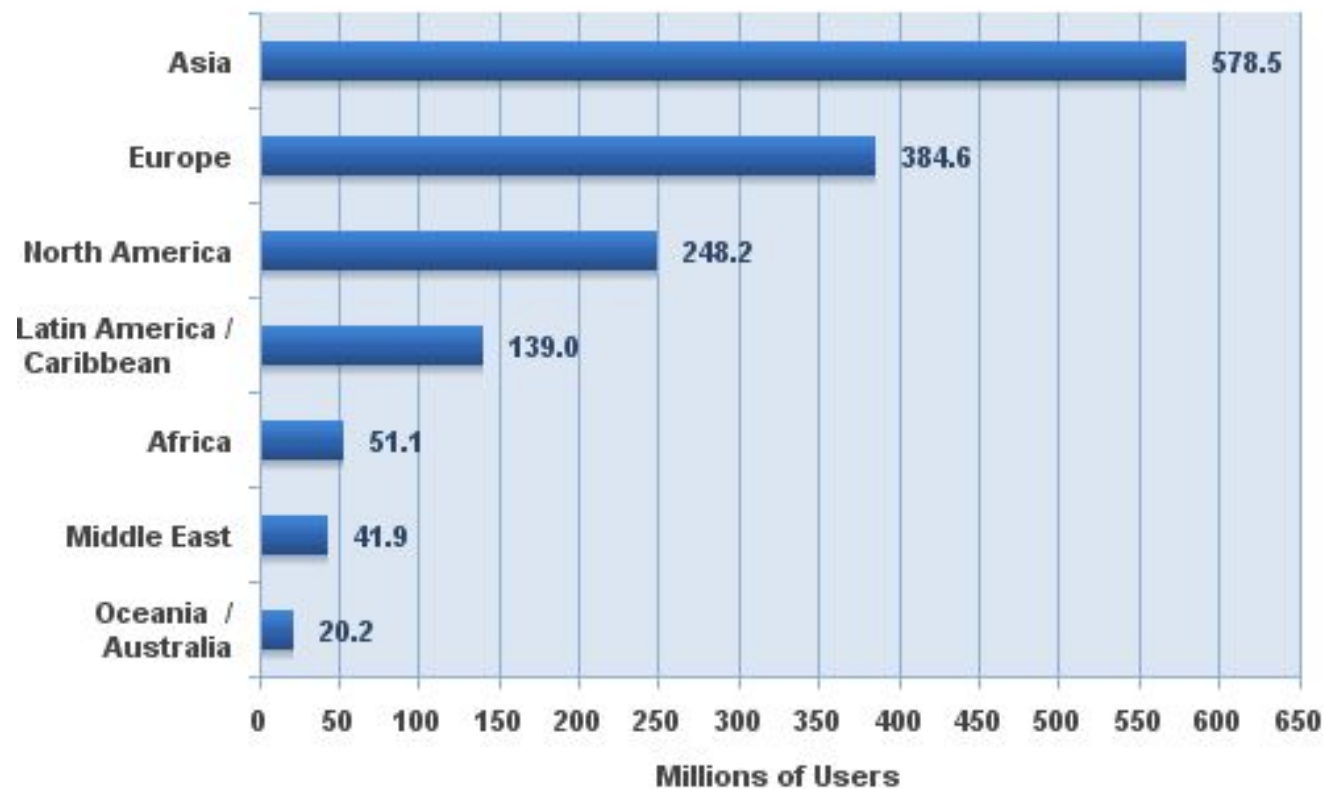OneSource is a leading provider of global business information services.

Dramatic Information Growth

Internet Host Growth

This produces information...

• New Companies
• Executive Bios
• News
• Blogs

Total Number of Internet Websites

600,000,000
500,000,000
400,000,000
300,000,000
200,000,000
100,000,000
0

Jan-94, Jan-95, Jan-96, Jan-97, Jan-98, Jan-99, Jan-00, Jan-01, Jan-02, Jan-03, Jan-04, Jan-05, Jan-06, Jan-07, Jan-08

Source: Internet Systems Consortium (www.isc.org)

Asia Is at the Top in Internet Users

Internet Users in the World by Geographic Regions

Region	Millions of Users
Asia	578.5
Europe	384.6
North America	248.2
Latin America / Caribbean	139.0
Africa	51.1
Middle East	41.9
Oceania / Australia	20.2

Millions of Users

Source: 2008 Internet World Stats (www.internetworldstats.com/stats.htm)

Korea is in the Top 5 in Asia

Asia Top Ten Internet Countries

Country	Millions of Users
China	253.0
Japan	94.0
India	60.0
Korea, South	34.8
Indonesia	25.0
Vietnam	20.2
Pakistan	17.5
Taiwan	15.4
Malaysia	14.9
Philippines	14.0
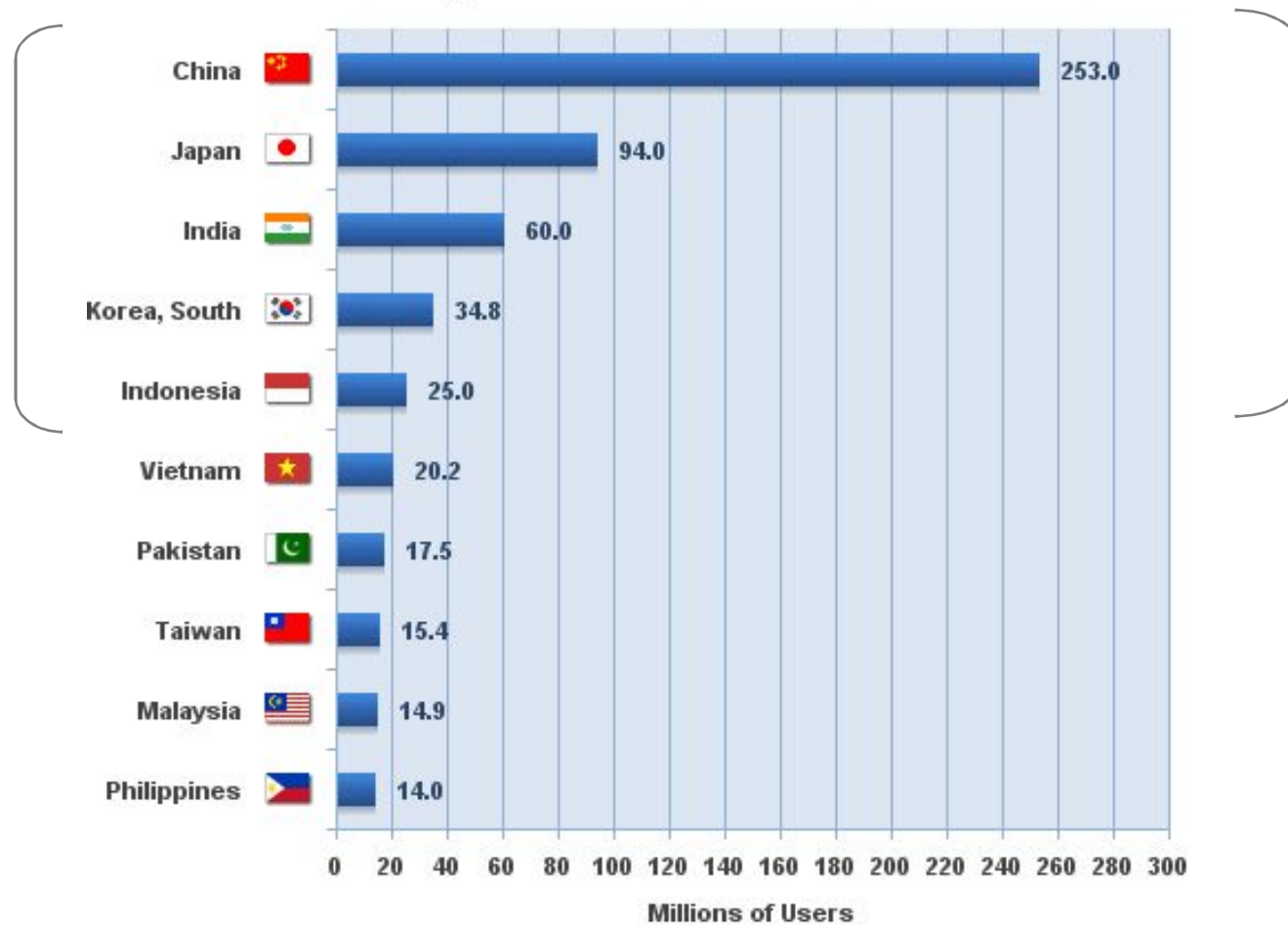
Source: 2008 Internet World Stats (www.internetworldstats.com/stats3.htm)

Traditional Areas of Competition in IT

OneSource
Global Business Information

Product

Price

Partners

Packaging

Promotion

Information As a Competitive Force

OneSource®
Global Business Information

Product

Price

Business
Information

Partners

Packaging

Promotion
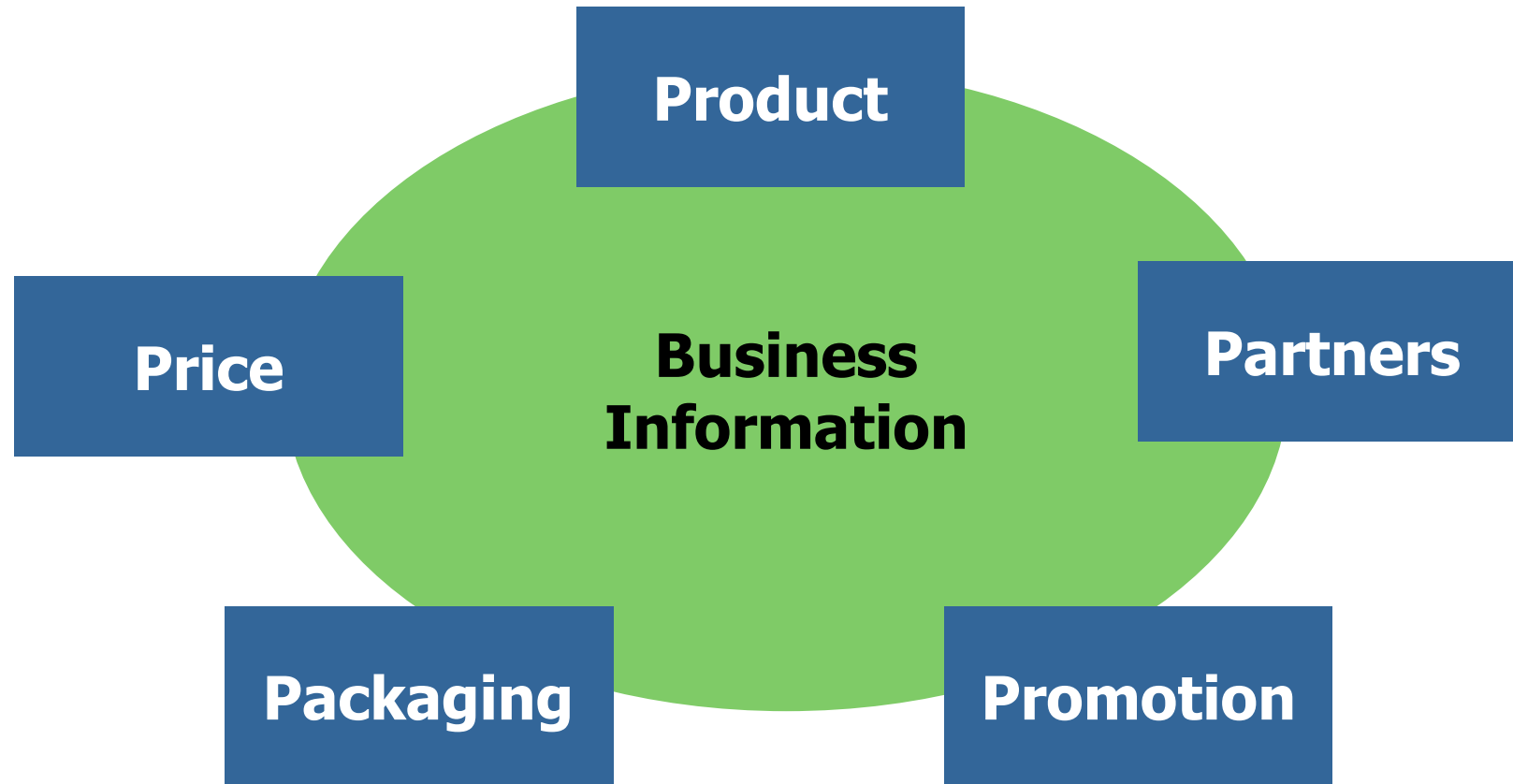
What Factors Are Driving Change

What single factor contributes most to the accelerating pace of change in the global business environment today?

Factor	Value
Innovation in products, services, business models	24
Greater ease of obtaining information, developing knowledge	17
Plentiful, cheap, mobile capital	12
Reduction in trade barriers	11
Expanded access to talent and labor pools	11
Rate of technological change	10
More capable competitors	8
Rising consumer awareness and activism	5

Source: McKinsey & Company Global Executive Survey

Factors Driving Increased Competition

OneSource®
Global Business Information

What single factor contributes most to the increasing competitive intensity in your industry today?

Industry[2] of respondent's company

	Business services	Consumer	Banking, finance	Health care	Heavy industry	IT	Telecom	Other
Improved capabilities of competitors (eg, better knowledge or better talent)	27	21	27	18	25	30	18	20
More low-cost competitors	25	25	11	18	36	24	27	14
More competitors	18	13	15	10	9	11	9	18
Growing size of competitors	7	13	14	10	8	10	9	8
Growing number of innovative market entrants	10	9	9	9	3	10	17	10
Regulatory changes (eg, market or industry deregulation, trade agreements)	4	4	12	22	8	3	17	10
Rising consumer awareness and activism	3	5	5	9	3	4	1	14
Growing number of attractive and accessible markets	3	4	5	1	6	5	2	2

Source: McKinsey & Company Global Executive Survey

Information Competitive Advantage

OneSource
Global Business Information

Examples of Competitive Advantages through Information...

Market Analysis	**Lead Generation**
Competitive Analysis	**Account Planning**
Sales Prospecting	**CRM**

Sources of Information

Information Services

Internet Searching

	Information Services	Internet Searching
Cost	Subscription	Time Spent Searching
Quality	High Quality	Mixed Information
Focus	Focused Results	Thousands of Pages to Review

Example Search Results

OneSource
Global Business Information

> microsoft executives korea 🔍

NAVER	19,996
Google	346,000
Live Search	5,490,000
YAHOO!	2,710,000

Example Search Results - Google

OneSource®
Global Business Information

Fixing image, **Microsoft** offers **Korea** software aid - International ...
SEOUL: **Microsoft** is establishing computing laboratories to assist local software developers in
South **Korea**, a top **executive** said Friday, as the company ...
www.iht.com/articles/2006/10/20/yourmoney/msft.php - 41k - Cached - Similar pages - Note this

Security360 Webcasts Available In 9 Languages
To view webcasts with Chinese, Japanese, or **Korean** captions, you will need the ... **Microsoft**
Executive Circle Webcast June 2005: Security360 with Mike Nash: ...
www.**microsoft**.com/events/series/mikenash/localized.mspx - 26k -
Cached - Similar pages - Note this

Media Alert: **Microsoft Executives** to Make Significant Company ...
Steve Ballmer, chief **executive** officer of **Microsoft** Corp.; .... South **Korea**. 82- 2-6744-1058.
00798-14800-66. Spain. 34-91-414-00-91. 800-099-387 ...
www.**microsoft**.com/presspass/press/2008/feb08/02-21NewsConferenceMA.mspx - 25k -
Cached - Similar pages - Note this

UBmatrix Hires Former **Microsoft Executive** and Opens New ...
UBmatrix Hires Former **Microsoft Executive** and Opens New Headquarters from ... state
augments UBmatrix facilities in California, **Korea**, Japan and Australia. ...
findarticles.com/p/articles/mi_m0EIN/is_2003_Oct_1/ai_108406419 - 48k -
Cached - Similar pages - Note this

**The first 4
results are not
very relevant**

Market Analysis

- Who are your customers?
  - *They might not be who you think they are!*

- What are your key vertical markets?
  - *How do you measure this?*

- Where is the greatest potential in your target markets?
  - *How are you defining your target market?*

- Where can we grow in new areas?
  - *What is our penetration by market and where is the opportunity?*

Who Are Your Customers

Industry Vertical

Technology 31%

Finance 11%

Manufacturing 9%

Public Sector 4%

Services 45%

Services Vertical Drill-Down

All Other 10%

Real Estate 4%

Accounting 7%

Recruitment 11%

Business Services 33%

Legal 11%

Management Consulting 24%
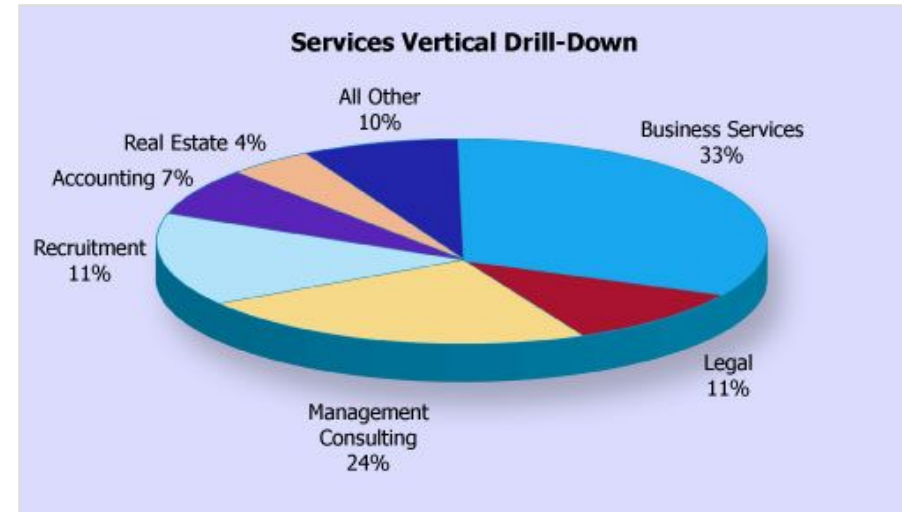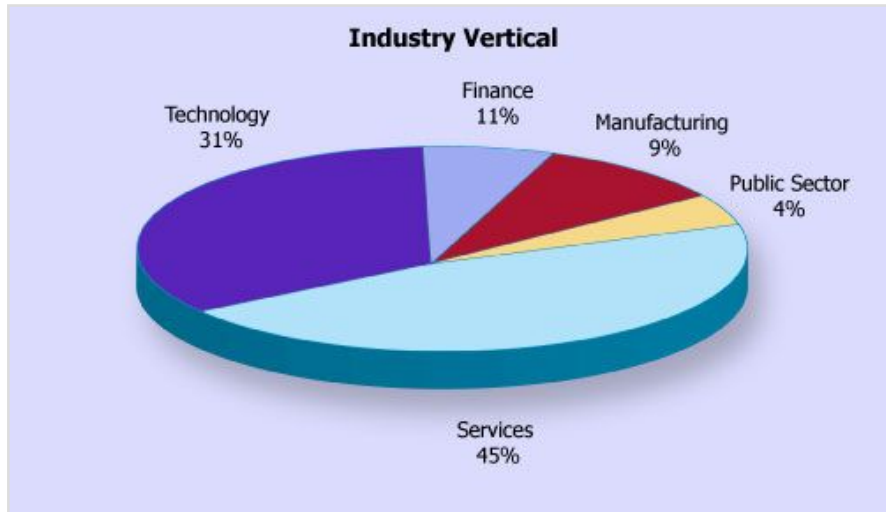
- Drill down beyond basic Vertical to Industry slices
  - Drill down further to SIC or NAICS code
- Horizontal segmentation:
  - Company Size
  - Geographic Region
  - Product Group/Division

Who Are Your Best Customers

Number of Customers by Industry Vertical
- Technology 31%
- Finance 11%
- Manufacturing 9%
- Public Sector 4%
- Services 45%

Sales Contribution by Industry Vertical
- Technology 22%
- Finance 15%
- Manufacturing 12%
- Public Sector 8%
- Services 43%
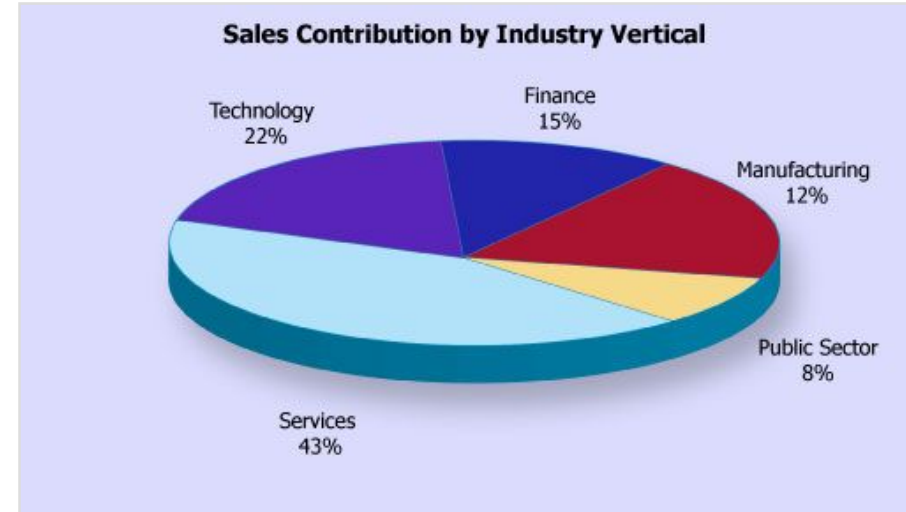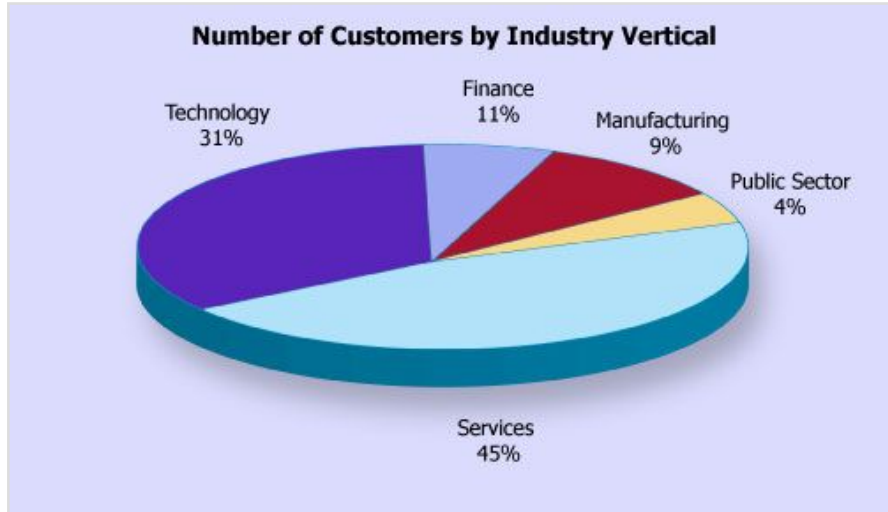
- Identify Best Customer Segments:
  - The segments that bring the most revenue per deal

- Average Customer Value:
  - Based on dollar sales, units, hours billed, seats.

Deal Size and Customer Value
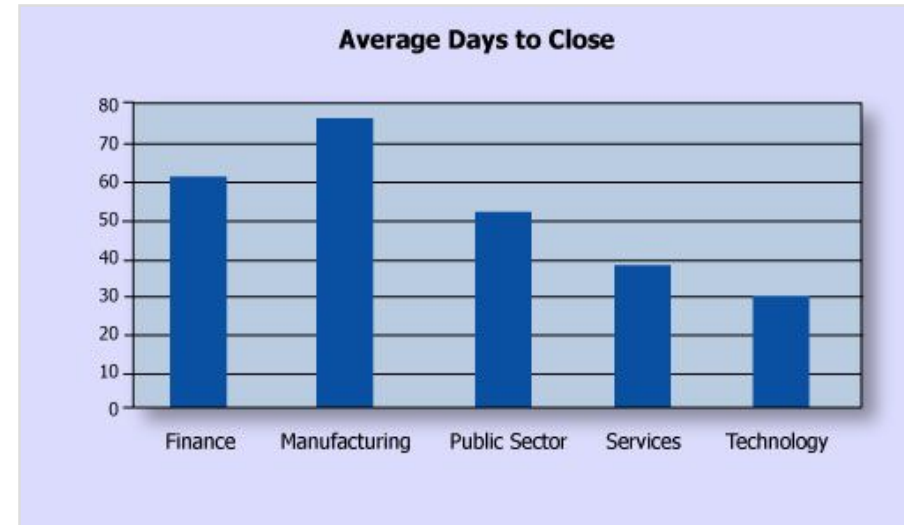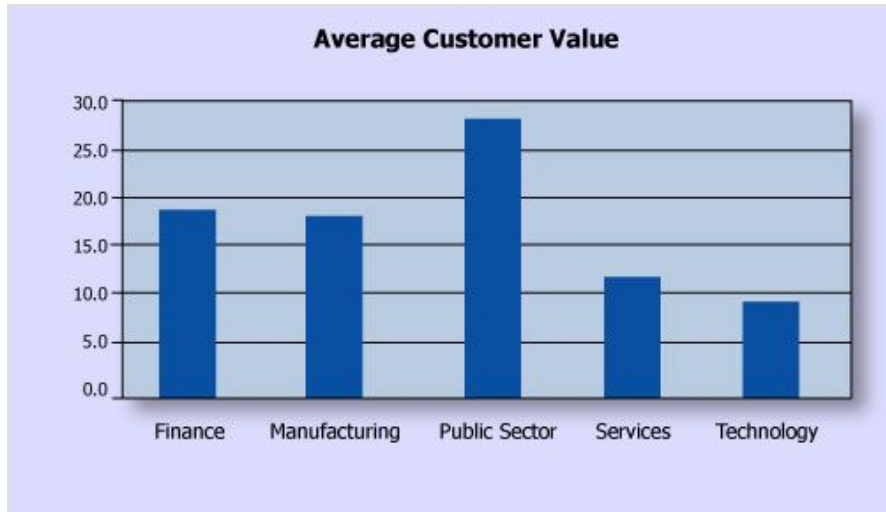
- Time is a critical element to success
  - Faster wins mean Revenue now
  - Smaller deals alone may not reach targets

- A balance of small and large deals is key to success!

Finding Market Potential
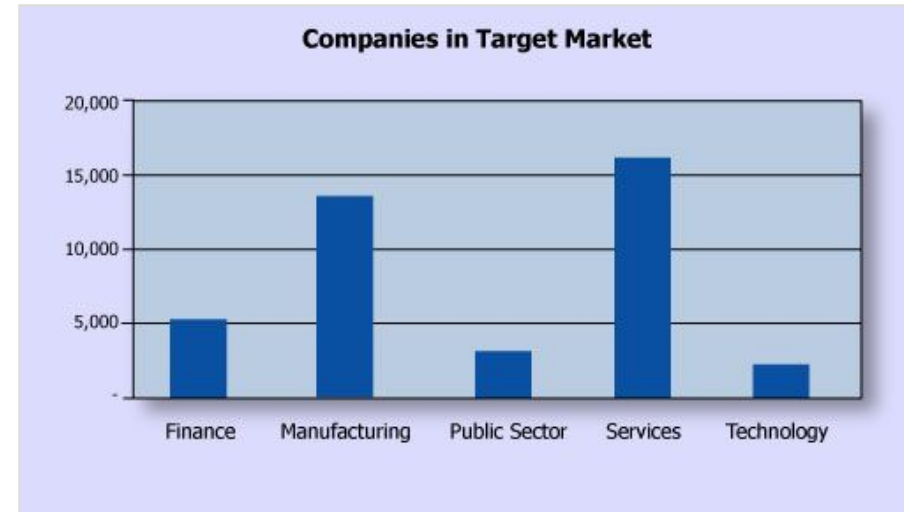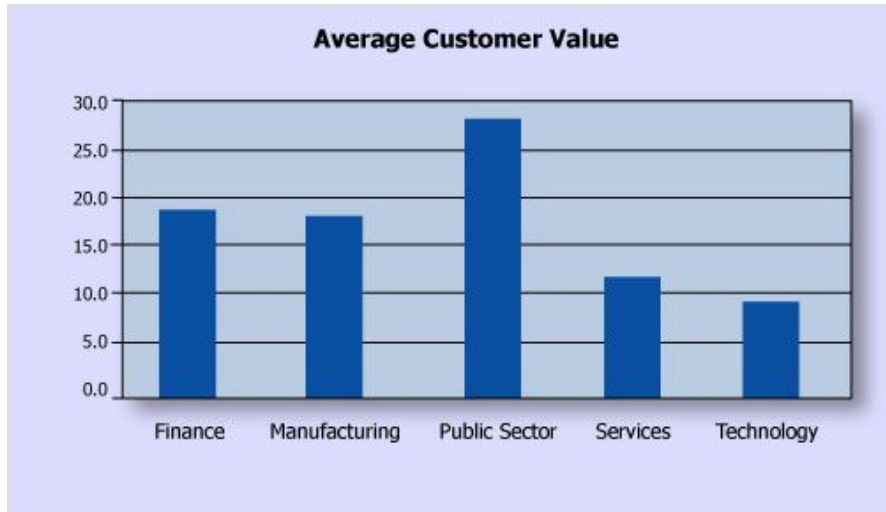
- Enhance prospecting opportunities by expanding target markets

- Develop best customer profile and add prospects with similar stats

Determining Market Penetration
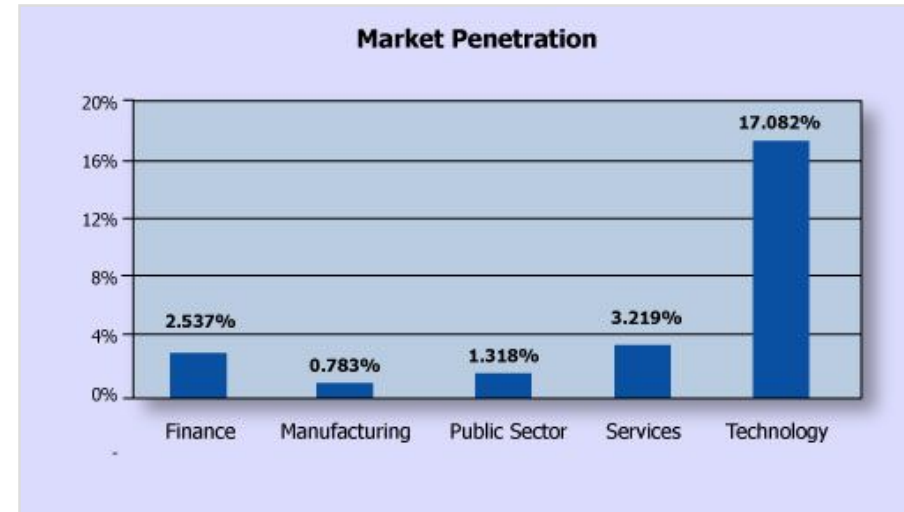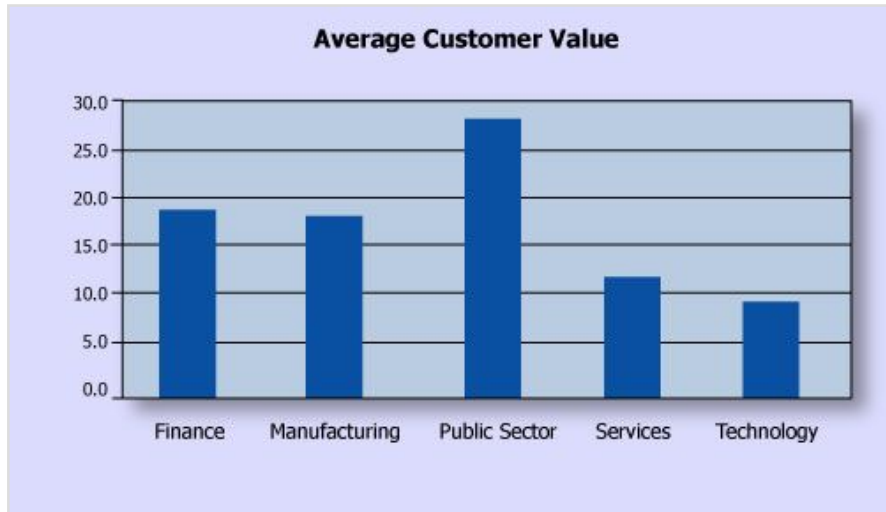
- Measure your Market Penetration
- Quantify the potential of your Target Market
- Target New and Underdeveloped Market Opportunities

Identifying Growth Markets

Sales Growth vs YAG

2006 Sales — 2007 Sales

Finance, Manufacturing, Public Sector, Services, Technology

Sales Growth

Existing Customers 42%   New Customers 58%
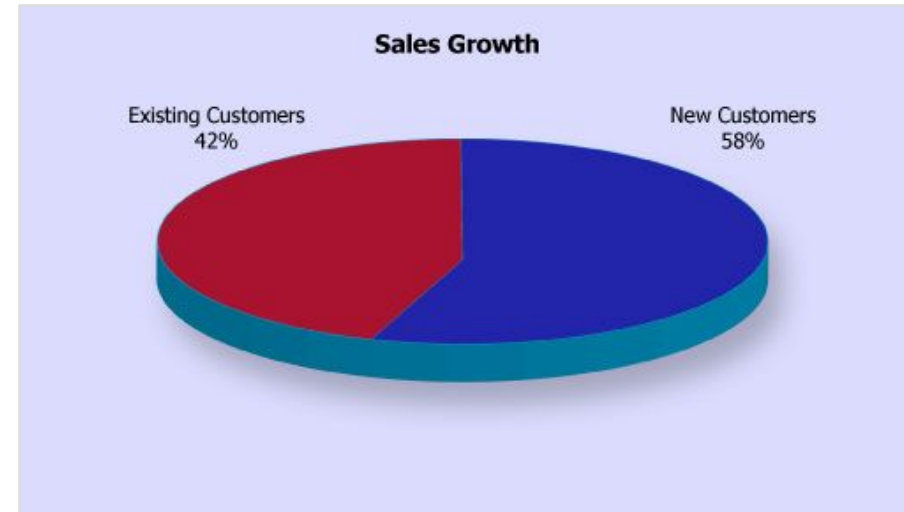
- Strategic planning to ensure ongoing success by tracking:
  - Customer base changes over time
  - Where new business is derived from
  - Turnover rates for various business segments

  Monitoring the changing customer enables identification of best new opportunities

Market & Competitive Analysis

OneSource®
Global Business Information

Successful companies are using many types of information for effective Market and Competitive Analysis

Marketing Lead Generation

OneSource
Global Business Information

Companies are ramping up lead generation efforts through targeted databases

Targeted Prospecting

Strategic Selling

Using Company Overviews for Strategic Selling

Account Planning

Industry

Industry	Software and Programming
ANZSIC 2006:	5420 - Software Publishing
NACE 2002:	7221 - Publishing of software
NAICS 2002:	511210 - Software Publishers
UK SIC 2003:	7221 - Publishing of software
US SIC 1987:	7372 - Prepackaged Software

Leading Sales Teams Research the Industry, Key Executives, and News

Key Executives in

Name	Title	Source
Jae Sung Yoo	Chief Executive Officer	infoUSA
Gregory Senich	Finance & Accounts Manager	BMI
Seung Pum Oh	Head of Sales	BMI
Jewan Woo	Information Technology Manager	BMI
Eun Kyung Yoon	Human Resources Manager	BMI

>>View 7 Executives

News

Title	Date
SK COMMUNICATIONS, MICROSOFT SIGN TIE-UP DEAL Asia Pulse (165 Words)	8-Oct-2008
MICROSOFT PLANS VIDEO-STREAMING SERVICE IN S. KOREA Asia Pulse (202 Words)	30-Sep-2008
Microsoft to cut Xbox 360 price in S. Korea Yonhap (155 Words)	26-Sep-2008
MICROSOFT TO CUT XBOX 360 PRICE IN SOUTH KOREA Asia Pulse (155 Words)	25-Sep-2008
MICROSOFT OPENS GAME DEVELOPMENT CENTER IN SEOUL Asia Pulse (208 Words)	30-Jul-2008

>> View All

Account Planning

OneSource
Global Business Information

One-Stop Report Set-Up

Please select the report(s) you want to include in the OneStop, then click "Create Report".

→ Select All Reports | → Deselect All Reports   Financials in USD (mil)

■ Descriptive Reports

☐ Company Summary
☐ Corporate Overview
☐ Corporate Family
☐ Executives

Company Information Reports help with Account Planning

Field Sales Forces can benefit from portable reports (e.g., PDF files)

■ News & Articles

☐ Latest 10 News Stories
  ⦿ Full Stories
  ○ Headlines Only
☐ Latest 10 Articles
  ⦿ Full Stories
  ○ Headlines Only

CRM Integration Example

CRM Integration Management

CRM Lead Enrichment Example

Import Leads into CRM System

CRM Prospecting Example

CRM Account Management

Business Data Aggregation

Aggregated Data is of Higher Quality and Easier to Use

Company and Executive Information	News & Articles	Industry Information	IT Profiles
REUTERS KNOW. NOW.	FT.com FINANCIAL TIMES	THOMSON	PART OF THE vnunet.com NETWORK
LexisNexis CorporateAffiliations	ProQuest Information and Learning	DATAMONITOR	
THOMSON	Access Intelligence	Freedonia	CORPDATA LIMITED
zoominfo people. information. summarized	AFX NEWS	rma THE RISK MANAGEMENT ASSOCIATION Serving the Financial Services Industry	
infoUSA.com Sales Solutions since 1972	Singapore Press Holdings		IT Market Intelligence.com by Applied Computer Research, Inc.
Cerved Business Information	NATIONAL POST	STAT·USA	
axesor GRAYDON CREDIT MANAGEMENT SERVICES	ASIA PULSE LSE	BUSINESS MONITOR international	
AsianCIS The leading global supplier of Asian Corporate Credit Information	CanWest Global Communications Corp.		
Creditreform MAILINGS CLEARING HOUSE			
GuideStar IncNet DP INFORMATION GROUP			
QUOTE.COM aRMadillo... ENDOVER TECHNOLOGY MARKETING REPORTS			
The WM Company A State Street business EDGAR ONLINE			
GLOBAL REPORTS AP Information Services Ltd.			

Usage by Leading Companies

Summary

- Information has become a key competitive differentiator in the IT industry across the globe

- Advantages can be gained across functions including sales, marketing, competitive analysis, market analysis

- Efficiently accessing the right information at the right time is critical to maintaining productivity

- Business information is best used directly by end-users through the web or enterprise systems such as CRM

- While many companies use information, those that use it most effectively have an opportunity to win against the competition