The Next Steps in Australia's Digital Revolution

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VP, Commercial Presales, APJ

DELL Technologies
We'll disrupt rather than be disrupted
- APJC: 51%
- Global average: 46%

I'm worried we'll be left behind
- APJC: 35%
- Global average: 30%

We'll struggle to meet changing customer demands
- APJC: 46%
- Global average: 51%

We'll struggle to prove we're a trustworthy organization
- APJC: 41%
- Global average: 49%

"Looking to the next 5 years, to what extent do you agree with the following statements about your organization?". Base: all respondents (4600) APJC (1300)
The pace of digital transformation in Australia

The Dell Technologies Digital Transformation Index, in partnership with Intel, showcases the status of digital transformation across the globe and how businesses are performing in this digital age.

<table>
<thead>
<tr>
<th>Digital Laggards</th>
<th>Digital Followers</th>
<th>Digital Evaluators</th>
<th>Digital Adopters</th>
<th>Digital Leaders</th>
</tr>
</thead>
<tbody>
<tr>
<td>Do not have a digital plan; limited initiatives and investments in place</td>
<td>Very few digital investments; tentatively planning for the future</td>
<td>Gradually embracing digital transformation and planning for the future</td>
<td>Have a mature digital plan, investments and innovations in place</td>
<td>Digital transformation ingrained in the DNA of the business</td>
</tr>
</tbody>
</table>

3% 28% 43% 19% 7%

Learn more at: DellTechnologies.com/DTIndex

2018 Dell Technologies Digital Transformation Index, conducted by Vanson Bourne.
Maturity by APJC Countries/Regions

Average score out of 100

<table>
<thead>
<tr>
<th>Country</th>
<th>Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>APJ total</td>
<td>47</td>
</tr>
<tr>
<td>Japan</td>
<td>29</td>
</tr>
<tr>
<td>Singapore</td>
<td>40</td>
</tr>
<tr>
<td>South Korea</td>
<td>40</td>
</tr>
<tr>
<td>New Zealand</td>
<td>42</td>
</tr>
<tr>
<td>Malaysia</td>
<td>42</td>
</tr>
<tr>
<td>China</td>
<td>49</td>
</tr>
<tr>
<td>Australia</td>
<td>50</td>
</tr>
<tr>
<td>Indonesia</td>
<td>50</td>
</tr>
<tr>
<td>Taiwan</td>
<td>52</td>
</tr>
<tr>
<td>Thailand</td>
<td>55</td>
</tr>
<tr>
<td>India</td>
<td>58</td>
</tr>
</tbody>
</table>

Average benchmark group scores. Base: all 2018 APJC respondents (1300) (Analysis showing the average scores)
Most and Least Mature: 2016 and 2018

2016
- India
- Australia
- China
- Japan

2018
- India
- Thailand
- Taiwan
- South Korea
- Singapore
- Japan

NEW IN 2018
- Thailand
- Taiwan
- South Korea
- Singapore
- Japan
## Top Five Tech Investments

<table>
<thead>
<tr>
<th>Rank</th>
<th>Category</th>
<th>Percentage</th>
<th>Region with Highest Investment</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Cybersecurity: 61% (3% more than the global average)</td>
<td>61%</td>
<td>India (74%), Thailand (73%)</td>
</tr>
<tr>
<td>2</td>
<td>IoT tech: 53% (7% more than the global average)</td>
<td>53%</td>
<td>India (67%), China (61%)</td>
</tr>
<tr>
<td>3</td>
<td>Artificial Intelligence: 50% (10% more than the global average)</td>
<td>50%</td>
<td>India (61%), China (60%)</td>
</tr>
<tr>
<td>4</td>
<td>Multi-cloud environment: 47% (3% more than the global average)</td>
<td>47%</td>
<td>Thailand (63%), India (62%)</td>
</tr>
<tr>
<td>5</td>
<td>Compute-centric approach: 38% (3% more than the global average)</td>
<td>38%</td>
<td>Thailand (61%), India (51%)</td>
</tr>
</tbody>
</table>

"What new innovations or solutions is your organization investing in over the next 1-3 years to enable digital business?". Base: all respondents (4600) APJC (1300)
DATA IS YOUR MOST VALUABLE ASSET
DATA DEFINES THE FUTURE

OUR WORLD IS BUILT ON DATA
Why did the monster change a lightbulb?

....It was a pirate
The next era of the human|machine partnerships
<table>
<thead>
<tr>
<th>Company</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dominos</td>
<td>2479%</td>
</tr>
<tr>
<td>Netflix</td>
<td>2374%</td>
</tr>
<tr>
<td>Amazon</td>
<td>647%</td>
</tr>
<tr>
<td>Apple</td>
<td>463%</td>
</tr>
<tr>
<td>Google</td>
<td>235%</td>
</tr>
</tbody>
</table>
“maximum digital contact and minimal human interaction”
Domino’s Robotic Unit
AI Accelerating Digital Transformation

AI-Enabled USER EXPERIENCE
Natural Language
Visual Sensing
Predictive

AI-Driven PROCESSES
Data Analytics
SW Development
Process Automation

AI-Optimized INFRASTRUCTURE
Feature Design
Technical Support

Improve the Human Condition
Ignite ROI
Scale Beyond Human Capacity
DELL IT: data lake & data science use cases

- **Simplified Renewals**: Develop Insights around installed base renewals – such as using CALM tool to improve renewal bookings.

- **Customer Support**: Service enabled dashboard with 360° data visualization of the health and wellness of customer’s Dell EMC hardware & software.

- **HR – Voluntary Attrition**: 90 days early warning on employees with high flight risk.

- **Security & Compliance**: Improve enterprise and cloud security for Dell and customers via predictive models.

- **Grow Revenue**: Identify new revenues using Predictive analytics.

- **Increase Efficiency**: Drive efficiency and productivity improvements using analytical insights.

- **Improve CSAT**: Provide a better user experience with 360° insights.

- **User Behavior Analytics**: Organization-wide threat intelligence layer to predict anomalies when users access EMC Network. Used by CIRC.

- **Credits & Collections**: Predict customer’s Patterns and Collection Behavior to improve revenue collection for GBS Services.

- **Drive Failure Analytics**: Optimize Service Costs and user Experience by predicting disk health and failures (VNX, VMAX, XIO).
Top 5 Barriers to Digital Transformation

### Asia Pacific Region

<table>
<thead>
<tr>
<th>Rank</th>
<th>Barrier</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Data privacy &amp; security concerns</td>
<td>41%</td>
</tr>
<tr>
<td>2</td>
<td>Lack of budget &amp; resources</td>
<td>36%</td>
</tr>
<tr>
<td>3</td>
<td>Lack of the right in-house skills</td>
<td>33%</td>
</tr>
<tr>
<td>4</td>
<td>Immature digital culture</td>
<td>30%</td>
</tr>
<tr>
<td>5</td>
<td>Regulation &amp; legislative changes</td>
<td>28%</td>
</tr>
</tbody>
</table>

### You

<table>
<thead>
<tr>
<th>Rank</th>
<th>Barrier</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Legacy systems &amp; processes</td>
</tr>
<tr>
<td>2</td>
<td>Regulation &amp; legislative changes</td>
</tr>
<tr>
<td>3</td>
<td>Rigid structure &amp; silos</td>
</tr>
<tr>
<td>4</td>
<td>Lack of the right in-house skills</td>
</tr>
<tr>
<td>5</td>
<td>Lack of budget &amp; resources</td>
</tr>
</tbody>
</table>

*What are the main barriers to achieving digital transformation within your organization?*. Base: all respondents (4600); APJC (1300)
SHIFTING IT EXPENDITURE TO INNOVATION

Modernize, Automate & Transform IT

- **30% Lower Total Cost**
- **2x Less Outages**
- **3x Greater Agility**
3 STRATEGIES TO ACCELERATE FORWARD

INVEST IN CULTURE & CAPABILITIES
Agile, DevOps, Cloud Native Apps

DEVELOP IN-HOUSE SKILLS
Software Development, AI, Cloud Architecture

AUTOMATE LEGACY INFRASTRUCTURE
Software Defined, Converged Infrastructure
Our purpose is to enable human progress through technology
Dell Technologies Social Impact

**ENERGY EFFICIENCY**
Reduced the overall energy intensity of our product portfolio by 60% since 2012.

**TECHNOLOGY FOR GOOD**
Transforming healthcare for 37m in rural India via Digital LifeCare solution.

**ETHICAL APPROACH**
World’s Most Ethical Companies 2018™
Fifth year in a row

**CIRCULAR ECONOMY**
1st with a certified closed-loop process for recycling plastics and gold from old computers back into new ones.

**SUPPLY CHAIN TRANSPARENCY**
Pioneered onsite and virtual reality tours of Dell and supplier factories.

**STEM**
Helping more than 1.2M kids in Ethiopia with 30k new PCs and more than 16M hrs of ICT education training to teachers.
Explore the full Digital Transformation Index.