






 SoftSummit™ 2015

Welcome, Industry & Flexera Software Update

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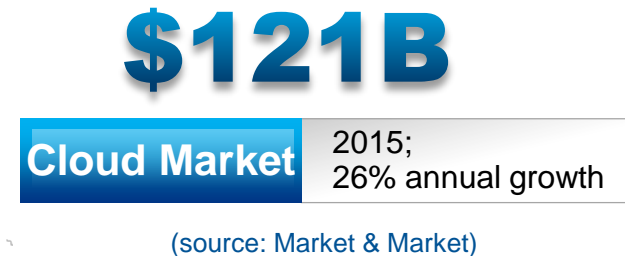
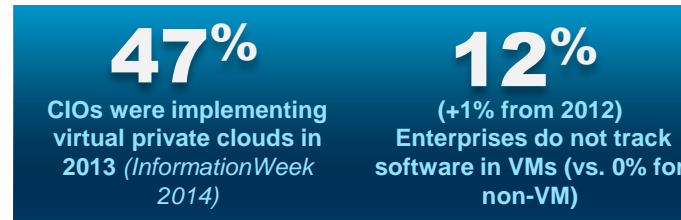
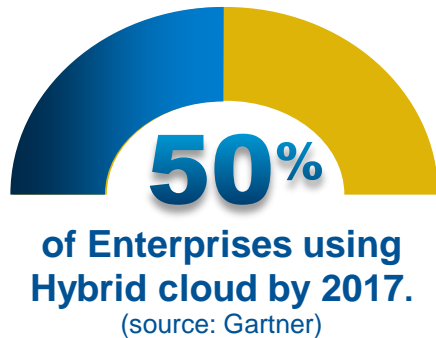
Software Makes the World Go Round

- Gartner says worldwide IT spending on pace to reach \$3.8 trillion in 2014
- Value of commercial software is \$369 billion
- Software frequently represents about 30% of IT spend
- Cisco sees the Internet of Things as having 5-10x the impact on society as the Internet itself and be worth \$19 trillion over the next decade



Market Trend 1—Heterogeneous Environments

- Virtualization 68% penetrated—the cloud enabler
- Mobile apps will be 25% of enterprise software budget by 2017
- 20% annual growth in SaaS apps through 2020
- 80% of apps will offer usage-based pricing option by 2017



Implications for Producers

- Virtualization is #1 enabler of accidental non-compliance
- Need to extend installation, delivery and monetization to new platforms
- Meet market demand for new subscription and usage licensing

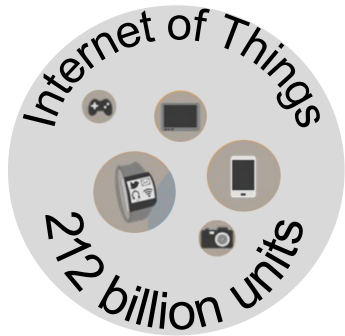
Implications for Enterprises

- More complex, heterogeneous environments to deploy and manage
- Fast deployment & change makes proactive compliance difficult
- Less visibility into license position



Market Trend 2—Internet of Things

- 87% of device manufacturers are adding “intelligence” to their devices, but 58% don’t yet monetize their software
- Intelligent device manufacturers, already over \$1.7 trillion in revenues, to see 10.1% compound annual growth (CAGR) to 2017



\$20-60 (Jan '15)



\$242 (Jan '15)

Implications for Producers

- Major business model transformation
- Huge business opportunity for those that get it right
- Need to setup and manage software business—licensing, entitlement management, delivery, etc.

Implications for Enterprises

- Explosion in number of IT assets to be managed—deploy software updates, track, etc.
- Uncharted territory in terms of managing licenses for intelligent devices



Market Trend 3—Process Integration

- Software should automate and manage business processes
- IT services are delivered with IT assets
- Companies expect increasing automation and efficiency
- Financial implications become primary focus



IT management
process maturity
market penetration:
5-20%

Gartner



Implications for Producers

- Business strategy and operations must evolve together
- Business agility requires flexible and adaptable Software Monetization
- Enterprises want licensing to be easier
- Focus on the entire software lifecycle

Implications for Enterprises

- Consistent processes needed across all software
- Focus on the entire software lifecycle
- IT as a service focuses on control and accurate data
- Increasing focus on financial impact and value



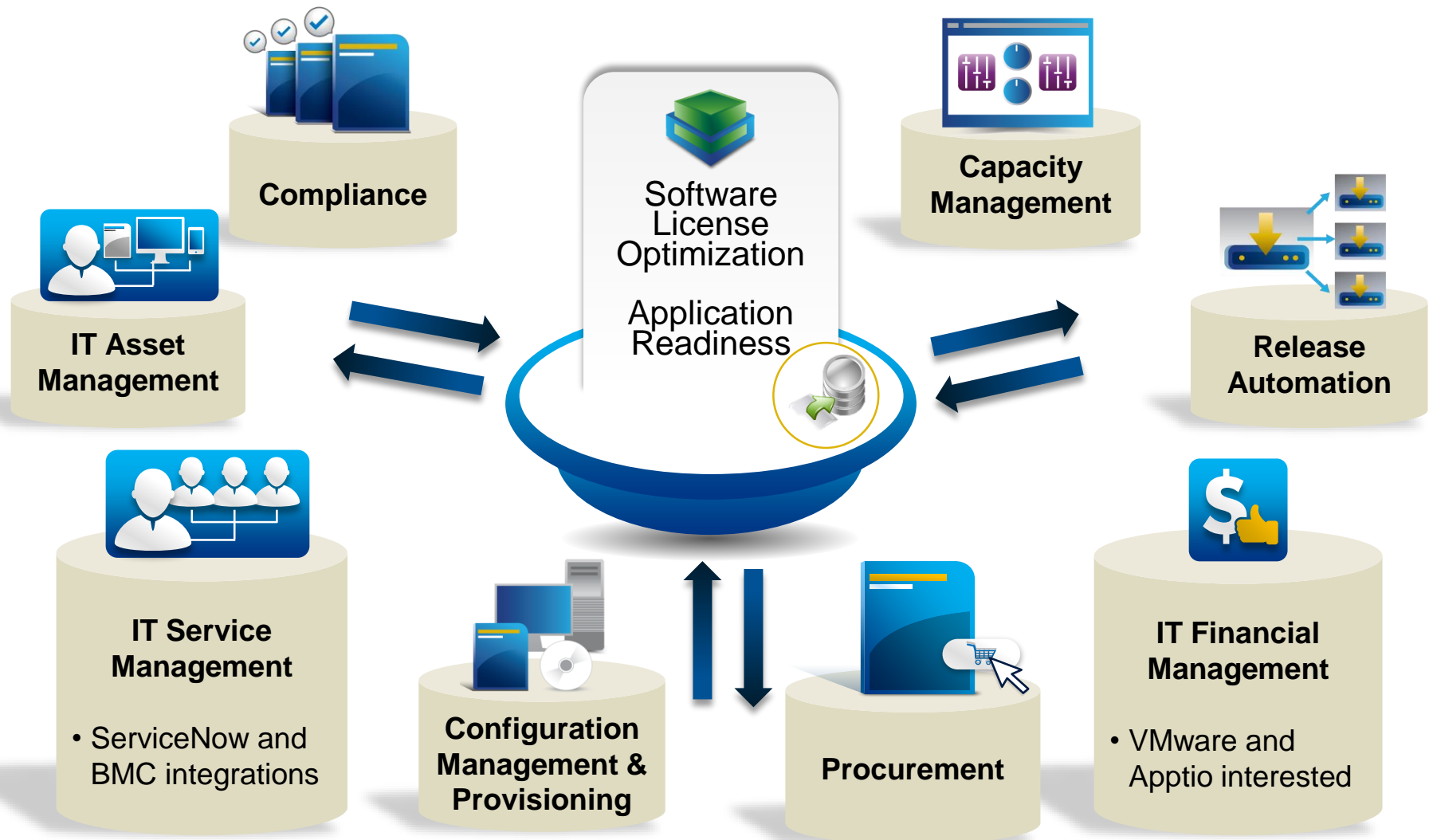
Industry standard used to:

1. Ensure continuous licensing compliance
2. Optimize software investments, and
3. Future-proof against technology changes



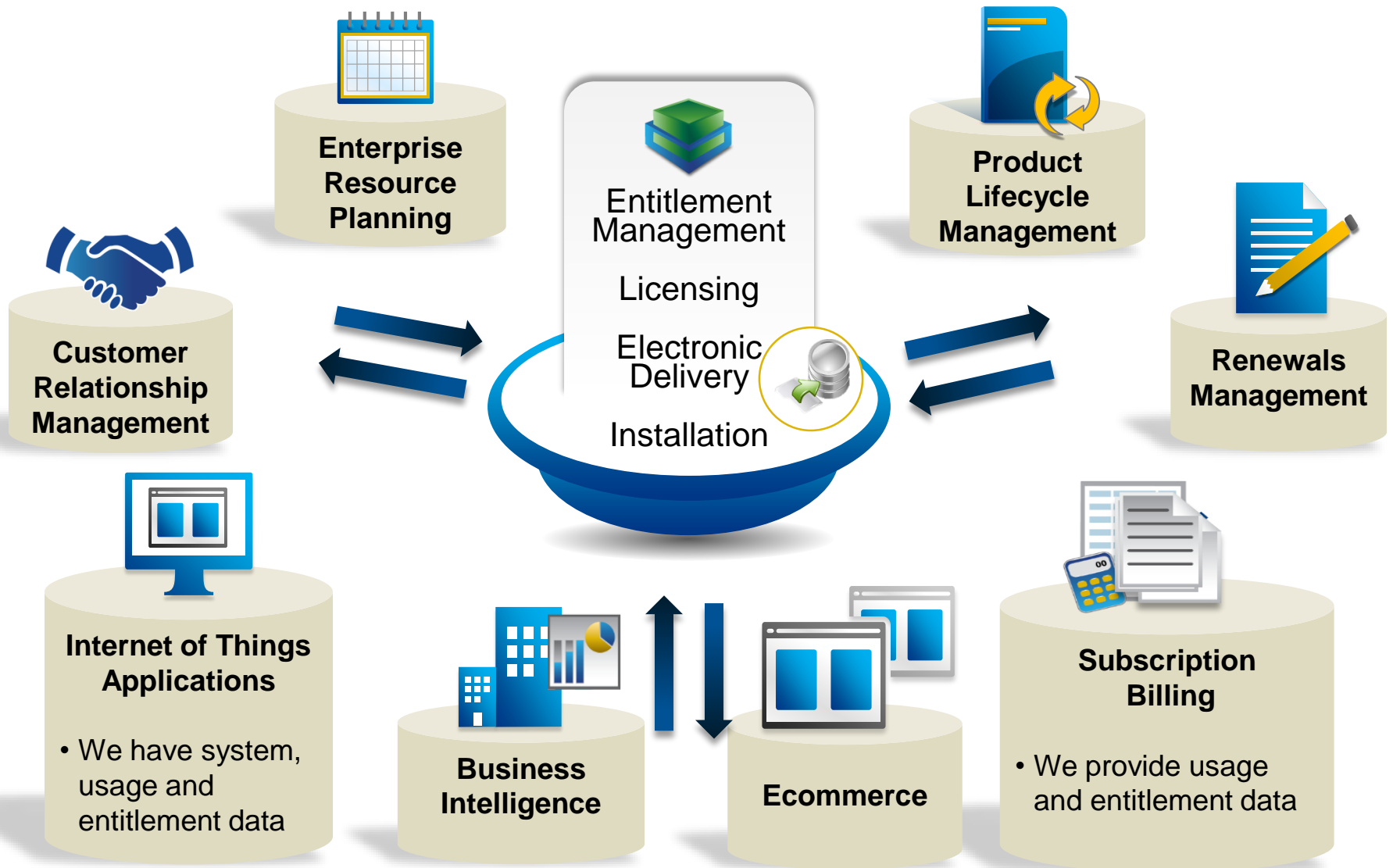
Enhancing IT Operations Business Processes

Integrating and Extending IT Operations Management Solutions

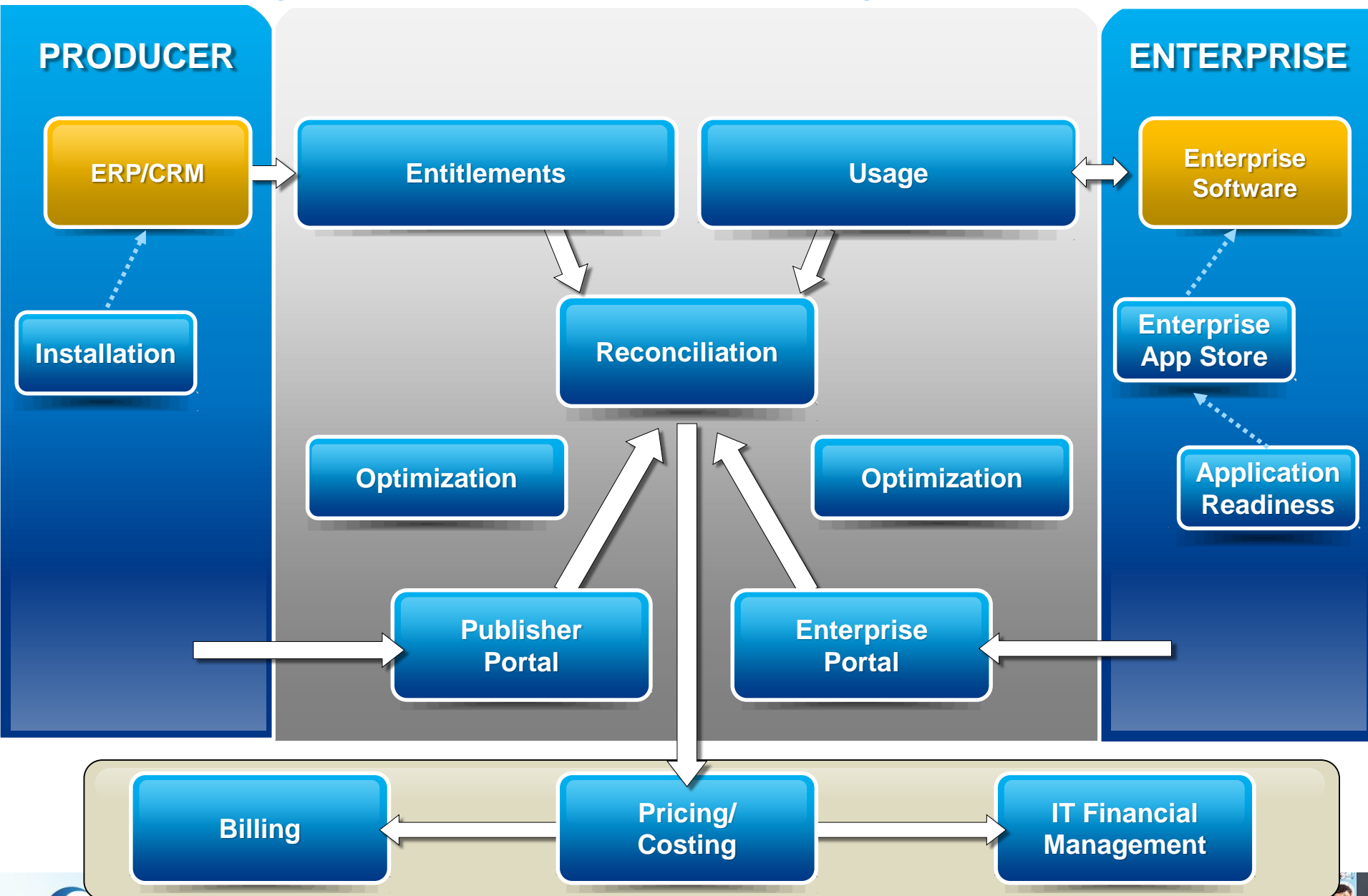


Enhancing Monetization Business Processes

Integrating and Extending Supply Chain Solutions



Ushering in a New Era—Breaking Down Walls





Flexera Software 2014 – 2015 Highlights



2014 - 2015 Producer Highlights

Gartner Reports: Licensing & Entitlement Management Is Key to Monetizing IoT

FlexNet Cloud Licensing Service

Usage Capture & Management in Connected & Disconnected Environments

FlexNet Embedded Tamper Resistant Application

FlexNet Licensing / Microsoft Azure Collaboration

Remote Diagnostics & Secure Downloads



2014 - 2015 Enterprise Highlights

FlexNet Manager for IBM Now Accepted by IBM for Sub-Capacity Reporting

FlexNet Manager for VMware Added to FlexNet Manager Suite

FlexNet Manager Suite Has Certified Integrations with BMC & ServiceNow ITSM Solutions

AdminStudio 2014 Mobile Application Management with AirWatch® by VMware Enterprise Mobility Management™

AdminStudio 2015 to be Released in July with Application Compatibility Testing for Windows 10

App Portal Universal Enterprise App Store for Desktop and Mobile





Agenda Highlights



SoftSummit 2015 Boston Agenda

Registration & Continental Breakfast
8:15 am - 9:15 am

Welcome, Flexera Software & Industry Update
Flexera Software
9:15 am - 9:45 am

Disrupting Digital: A Look into the Future of Business
R "Ray" Wang, Constellation Research
9:45 am - 10:30 am

Break
R "Ray" Wang Book Signing
10:30 am - 11:00 am



Producer Track – Software Monetization

Software Producer & Intelligent Device Manufacturer Track

11:00 am - 11:30 am – Usage, Subscription and Value-based Licensing Model Trends & Insights

Amy Konary, IDC

11:30 am - 12:00 pm – Panel Discussion: Hardware to Software, On-Premises to Cloud/SaaS & Perpetual to Subscription and Usage/Consumption *Moderator: Richard Northing, Flexera Software, Panelists: Amy Konary – IDC, Paul Bagley – KPMG, Flexera Software*

12:00 pm - 1:15 pm – Lunch

1:15 pm – 1:45 pm – Software Monetization Maturity Model & Use Cases – *Mathieu Baissac, VP Product Management – Flexera Software*

1:45 pm - 2:15 pm – Know Your Customer: Why Your Chief Revenue Officer Needs to Care About Software Monetization *Geoff Surkamer, WW Software Monetization – Flexera Software*

2:15 pm – 2:45 pm – Break

2:45 pm - 3:15 pm – A Business Model Transformation Success Story...From Hardware to Virtual Appliances *Jason Anderson, Vice President of Operations – Lancope*

3:15 pm - 4:45 pm – Trends, The Impact To Your Business and How Flexera Software Products Help You Monetize the Trends *Mathieu Baissac, VP Product Management – Flexera Software*

4:30 pm - 6:00 pm – Networking & Cocktail Reception



Enterprise Track—Software License Optimization & Application Readiness

11:00 am - 11:30 am – Industry Trends

11:30 am - 12:00 pm – Enterprise Customer Panel Session

12:00 pm - 1:15 pm – Lunch

1:15 pm - 2:00 pm

Managing Software Licenses in Virtual Environments

or

Best Practices in Service Delivery: Changing the Perception of IT

2:00 pm - 2:45 pm

The Business Value of Software License Optimization and ITSM Integration

or

Application Readiness: How Ready Are You?

2:45 pm - 3:15 pm – Break

3:15 pm - 4:00 pm

License Optimization for the Datacenter

or

Assessing Compatibility and Planning for Windows 10

4:00 pm - 4:30 pm

Software License Optimization Roadmap

or

Application Readiness Roadmap

4:30 pm - 6:00 pm – Networking & Cocktail Reception



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