2017 Member Meeting

Dec 13, 2017

Welcome to the 2017 Annual Member Meeting...

❑ This meeting is an update on TSANet business and activities as defined in the TSANet Bylaws 4.01 (Annual Business Meeting).

❑ There is no voting scheduled during the meeting however, you can bring up any TSANet business you wish to address

❑ The designated Global Business Manager for Open Group Members carries a single vote per member company

❑ A request for any new business will be held at the end of this webinar

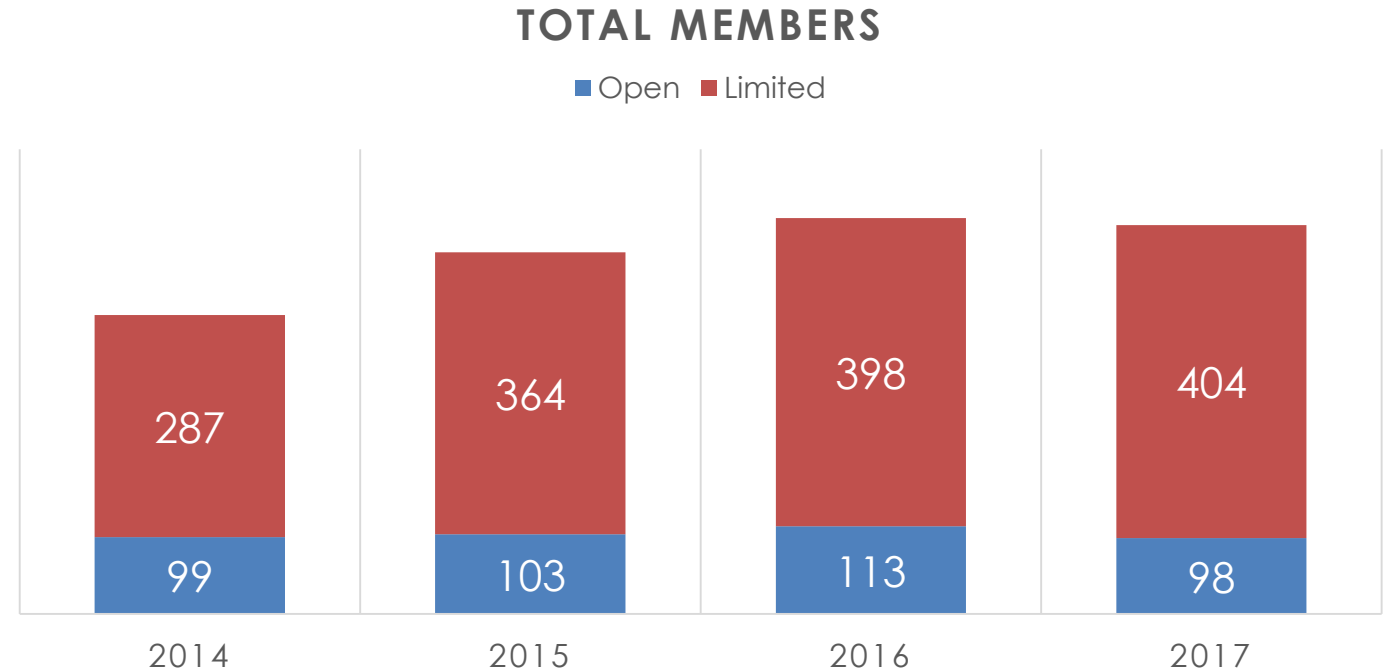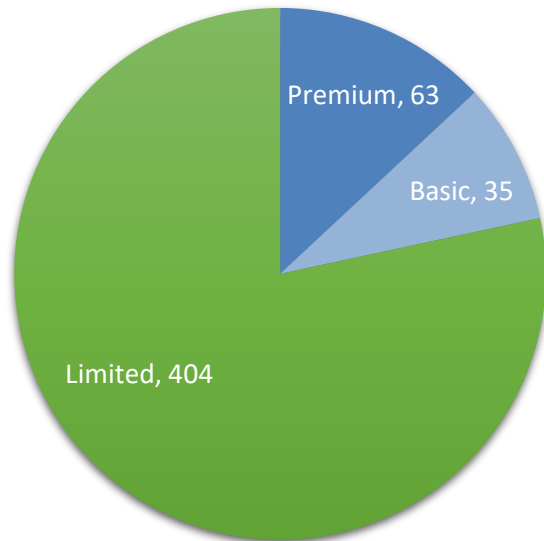❑ Contact Dennis Smeltzer for any TSANet business related questions or contact our Chairman René Karel, VMware

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Our members say continue to…

1. Add More Vendor and Channel Members

2. Improve how Members Collaborate

3. Expand to provide Solution Support

TSANet has the Relationships, Tools and Processes needed to enable Solution Support

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Status – Membership

TOTAL MEMBERS

Open Limited

Year	Limited	Open
2014	287	99
2015	364	103
2016	398	113
2017	404	98

Pie chart: Premium, 63; Basic, 35; Limited, 404

❑ Overall Membership is flat in 2017 – Lost several open group members in first half but now improving

❑ Limited Member growth continues. New Custom groups in 2017 have started to add more members

❑ Some new Channel members but below our targets – Channel wants more value (Solution Support)

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Improve how Members collaborate

❑ Deploy Case Exchange to Members

❑ Provide an enhanced Collaboration Platform for Custom Groups

❑ Provide flexible model for Members to Create Microsites for various use cases (Projects, Common Customer, Solutions)

Team Microsite

Conversations   **Cases**   **Files**

T S A N E T

Member Web – Current State

New site launched Aug 2014 with Bi-Annual releases in 2015, 2016 and 2017 added several new features and improved usability. Main features were:

1. *Access from any device (Mobile)*

2. *Shortcuts (Tiles in the My TSANet space)*

3. *Custom Group Microsite*

4. *Simplified and consistent Contact Document*

5. *Improved Search (Dynamic)*

6. *Internal Notes*

7. *Self Registration (And Piloting new login methods)*

8. *New relationship models*

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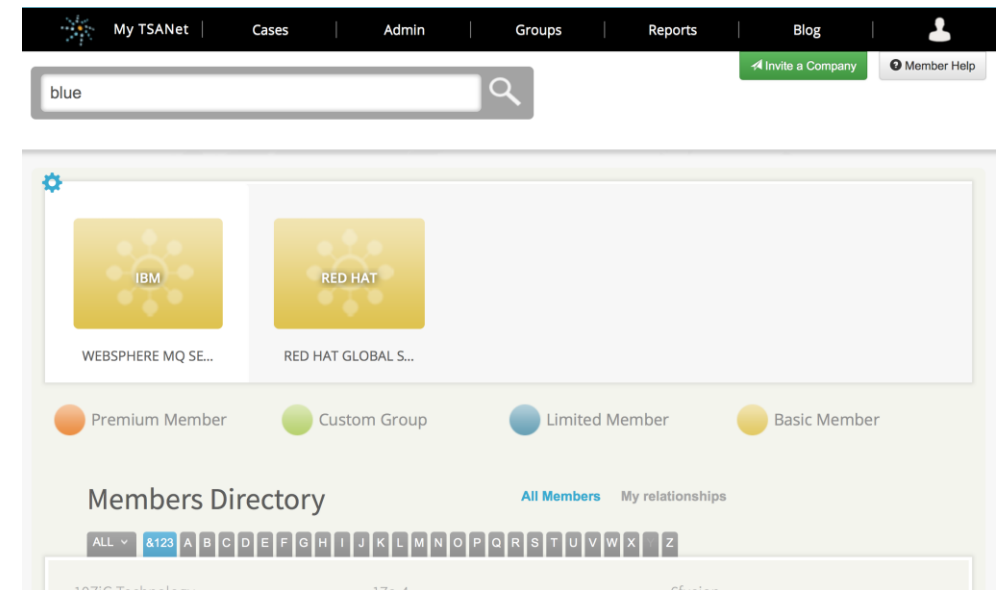
Case Exchange - New Salesforce Connector

- ❑ 3 New features and some bug fixes
- ❑ Version 4.1 available in Salesforce App Exchange
- ❑ Member Help updated
- ❑ Will start to upgrade existing members next week (Everyone must upgrade for cascading dropdown to work)

A new Case Exchange connector version 4.1 is now available for Salesforce.   This release contains three new features that have been requested from members.   It is recommended that all existing users upgrade to this new connector.

New Features

- **Lightning compatibility**:The new version is compatible with Salesforce Lightning interface as well as the Classic interface.
- **Cascading dropdown custom fields**: This version supports up to 3 levels of dependent dropdowns in custom fields. Example of a dependent dropdown: State / City: when a user selects a State in one field, the next field City should show a City list within the selected state.   **Read More**
- **Scheduled message pickup**: Salesforce includes a method to scheduled message pickup. When there are inbound B2B messages ready, there are two ways to get it into Salesforce: push or poll. Push is real time, and poll is on a schedule. This feature adds scheduled poll, in addition to previously available, existing real time option. Scheduled pickup is easier to configure, more reliable, is now the recommended option.   **Read More**

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Case Exchange - Web features

❑ Custom Email notification templates (Provides email integration options)

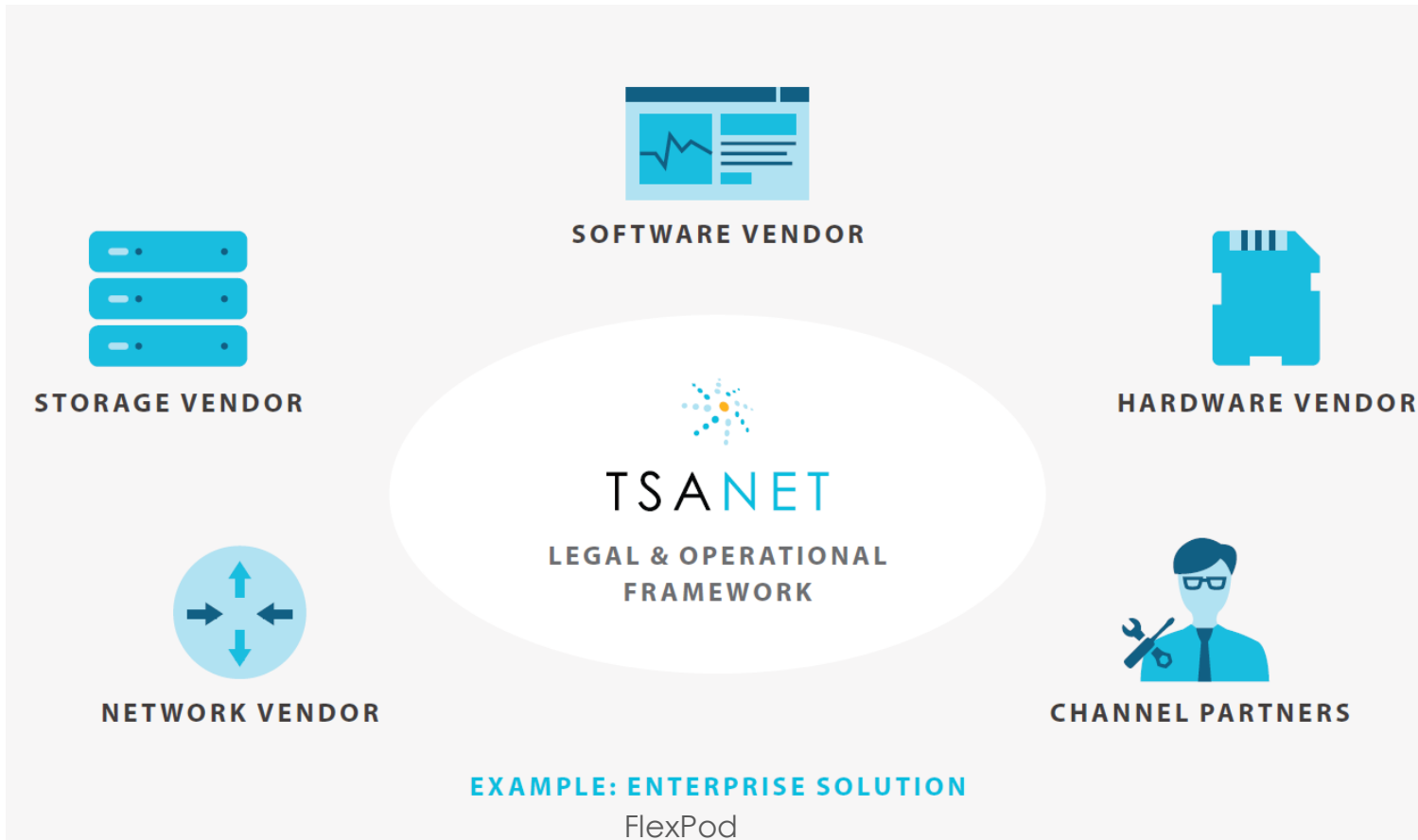❑ Additional integration to Contact document (IBM POC)

❑ Cascade Custom Fields

Member Web Contact Document

Log a Case

Email Notifications (New and Updates)

Case Exchange

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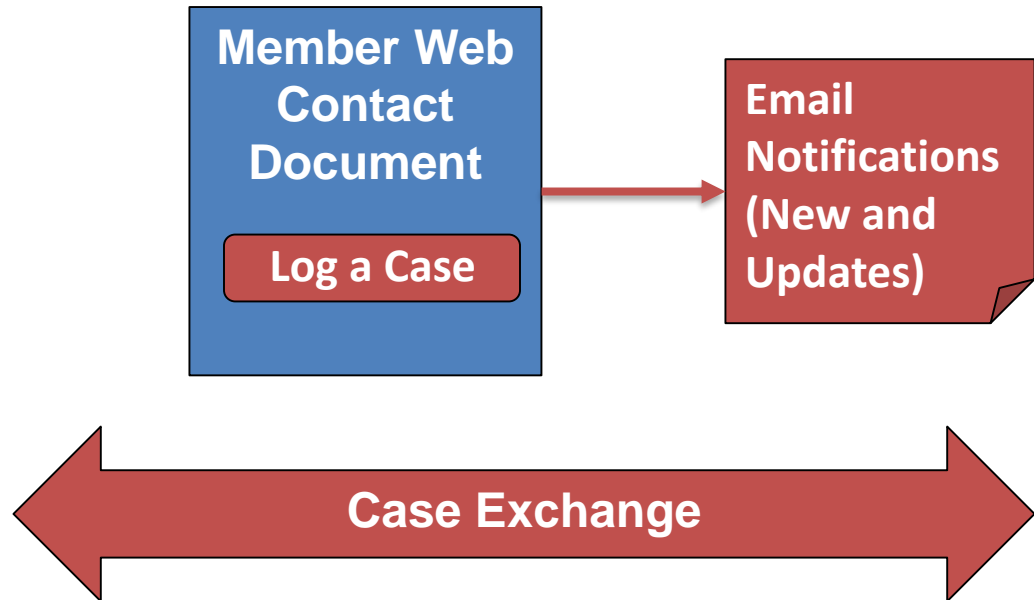
Case Exchange Member Activity

In Production

Member	Connection Type
IBM	Web
Red Hat	Salesforce
Actian	Salesforce
Aptare	Salesforce
Canonical	Web
Puppet Labs	Web
Citrix	Web
Crunchy Data Systems	Web
Unisys	Web
Datalink	Web
Netmotion Software	Salesforce
DataCore	Web
Juniper Networks	Web
Lenovo	Salesforce
Nexenta	Salesforce
Nuage	Web
ZeRTO Ltd.	Web
6fusion	Web
Maxta	Web

Leads

Member	Connection Type	Status
VMware	Web**	Piloting
Nimble Storage	Salesforce	Testing
NVIDIA	Web	Testing
Symantec	Web*	Testing
CA Technologies	Web*	Testing
NetApp	Custom POC	Testing
Nutanix	TBD	Under Review
Intel	Salesforce	Under Review
Pivotal	Web**	On hold
HPE	Salesforce	On Hold
Cloudbees	Web**	On Hold
Dell EMC	Salesforce	On Hold
Docker	Web**	On Hold
AppDynamics	Web	New
Palo Alto	TBD	New
Progress	TBD	New
Commvault	Web	Testing

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What is Solution Support

STORAGE VENDOR

SOFTWARE VENDOR

HARDWARE VENDOR

NETWORK VENDOR

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LEGAL & OPERATIONAL FRAMEWORK

CHANNEL PARTNERS

EXAMPLE: ENTERPRISE SOLUTION
FlexPod

❖ Customers are looking for technology solutions that solve business problems
❖ Solutions are created with Vendor and Channel Companies
❖ To accomplish this Partners must design both the solution and the support model

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TSANet Solution Support Framework

Customer

Member Defined Support Model

STORAGE VENDOR

SOFTWARE VENDOR

HARDWARE VENDOR

NETWORK VENDOR

Enterprise Solution

CHANNEL PARTNERS

Operational Framework

Use our Cross-Vendor Platform for Easy Collaboration Between Partners

TEAM SITE COLLABORATION PORTAL

CONVERSATIONS

CASES

FILES

TOOLS

Connect with Case Exchange

WEB INTERFACE / EMAIL NOTIFICATIONS

CASE EXCHANGE

salesforce
NETSUITE
Microsoft Dynamics CRM

CRM CONNECTORS

Industry Adopted Legal Framework

Common Code of Conduct

Solution Support Agreement

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Status – Solution Support

1. Created a brochure and related marketing material

2. Made changes to the Member Web to allow for more flexible relationships in Custom Groups

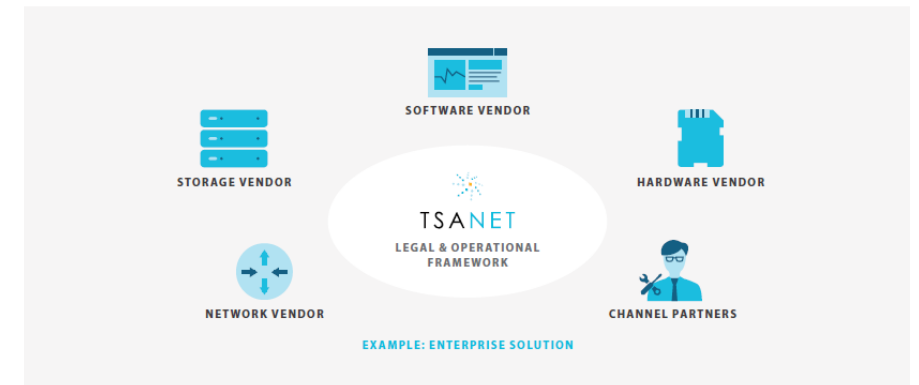3. Looking at a few Solution Support pilots – Plan to start some in 2018

Finance – 2017 Status

Expenses on track

1. Year to Date - End of Nov (779k Plan, 768k Actual)

2. Expect to end the year at budget

Revenue above target

1. Loss of open group members compensated by higher percentage of Premium Members

2. Expect to end the year with similar membership as end of 2016 and will plan for flat revenue in 2018

Expected end of 2017 cash assets (820k)

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Finance – 2018 Plans

2018 is an investment year: Plan for increase of 65k on expense side…

1. Investment year for systems – Increase from $33,200 to $90k with majority of budget to improve Web Case Exchange

2. Our 25th Anniversary – Increase Marketing as we refresh the Public Web (Increase from $5,500 to 10,500k)

3. Travel – Expect increase as we add a Europe trip (Increase from $11,800 to 15k)

2018 Revenue Plan - Same as 2017

Budget end of 2018 cash assets (755k)

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Strategy Roadmap – High Level

2017

Membership & Marketing

- ✓ Add more Technology and Channel Partner programs
- ✓ Create new brochure and banner for Solution Support
- ✓ Improve Member adoption

Offering & Operations

- ✓ Continue to Deploy Case Exchange and improve based on Member feedback
- ✓ Work with Vendors to identify next generation solution support needs
- ✓ Reviewed next generation collaboration platforms

2018

Membership & Marketing

- ❏ Add more Technology and Channel Partner programs
- ❏ Expand regional focus groups
- ❏ Improve Member adoption
- ❏ Public Website refresh

Offering & Operations

2019

Membership & Marketing

- ❏ Add Solution Support programs (Vendor and Channel mix)
- ❏ Add more Channel Members
- ❏ Improve Member adoption of solution support offering

Offering & Operations

Create and deploy next generation collaboration platform

Create and deploy Solution Support Framework

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2018 Plans

Membership – Get involved!

Board of Directors

- Approves Strategy
- Approves Budget
- Approves Projects
- Other decisions involving the association
- Face-Face 3/year, monthly call

India

Japan

Europe

Australia
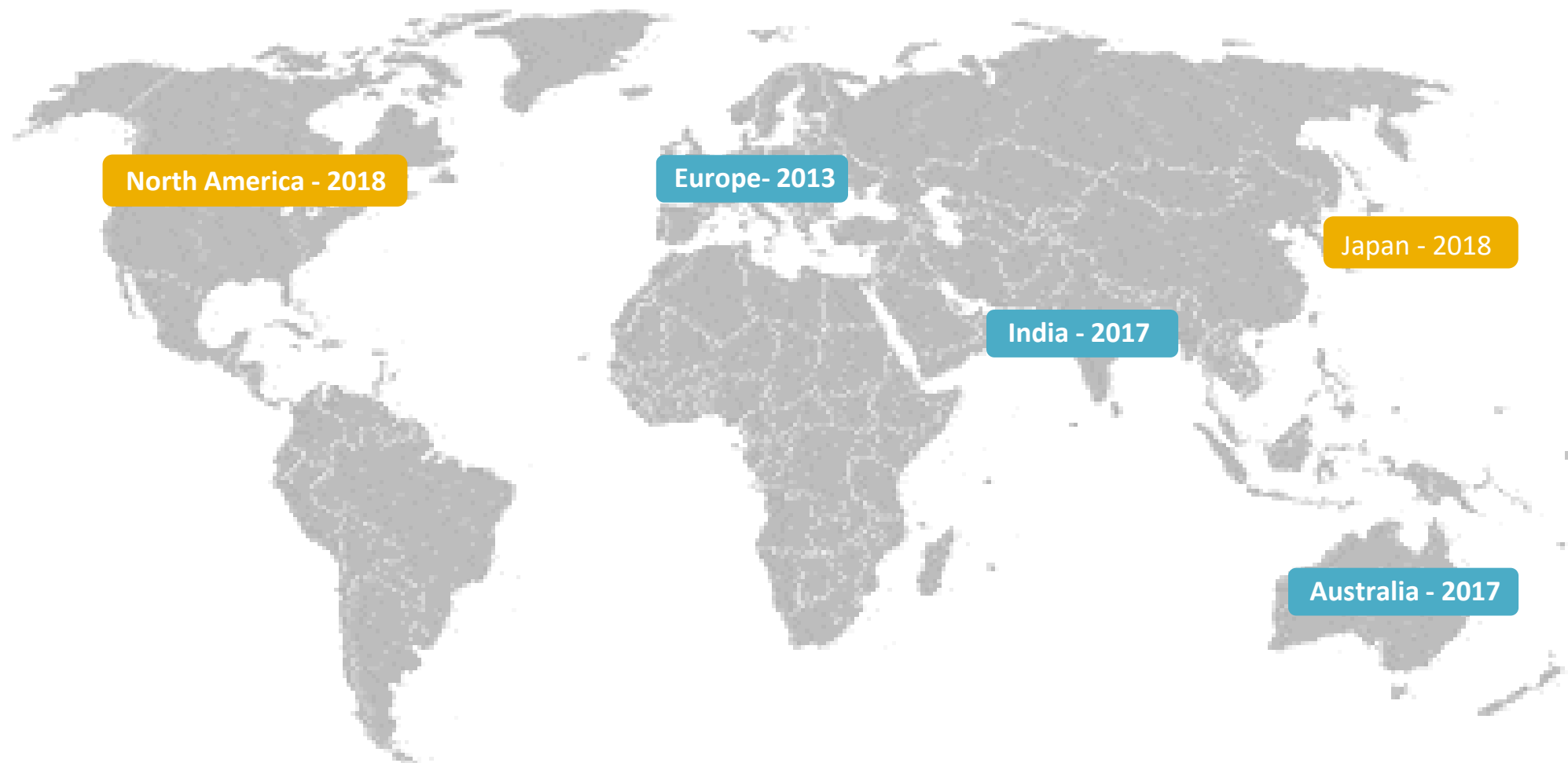
Regional Focus Groups

- Feedback on TSANet (Strategy and Operations)
- Best Practice Sharing
- Other Support and Service topics
- May include non-members
- Face-Face 2/year, Quarterly call

Technology Committee

Committee

- Focused on a specific area (Collaboration Technology)
- Set objectives and scope
- May include non-members
- Meetings as defined by the group

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Expand Regional Member Focus Groups

North America - 2018

Europe- 2013

Japan - 2018

India - 2017

Australia - 2017

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Technology Committee

Owner
❑ Paul Esch & Kenny Bunnell

Members
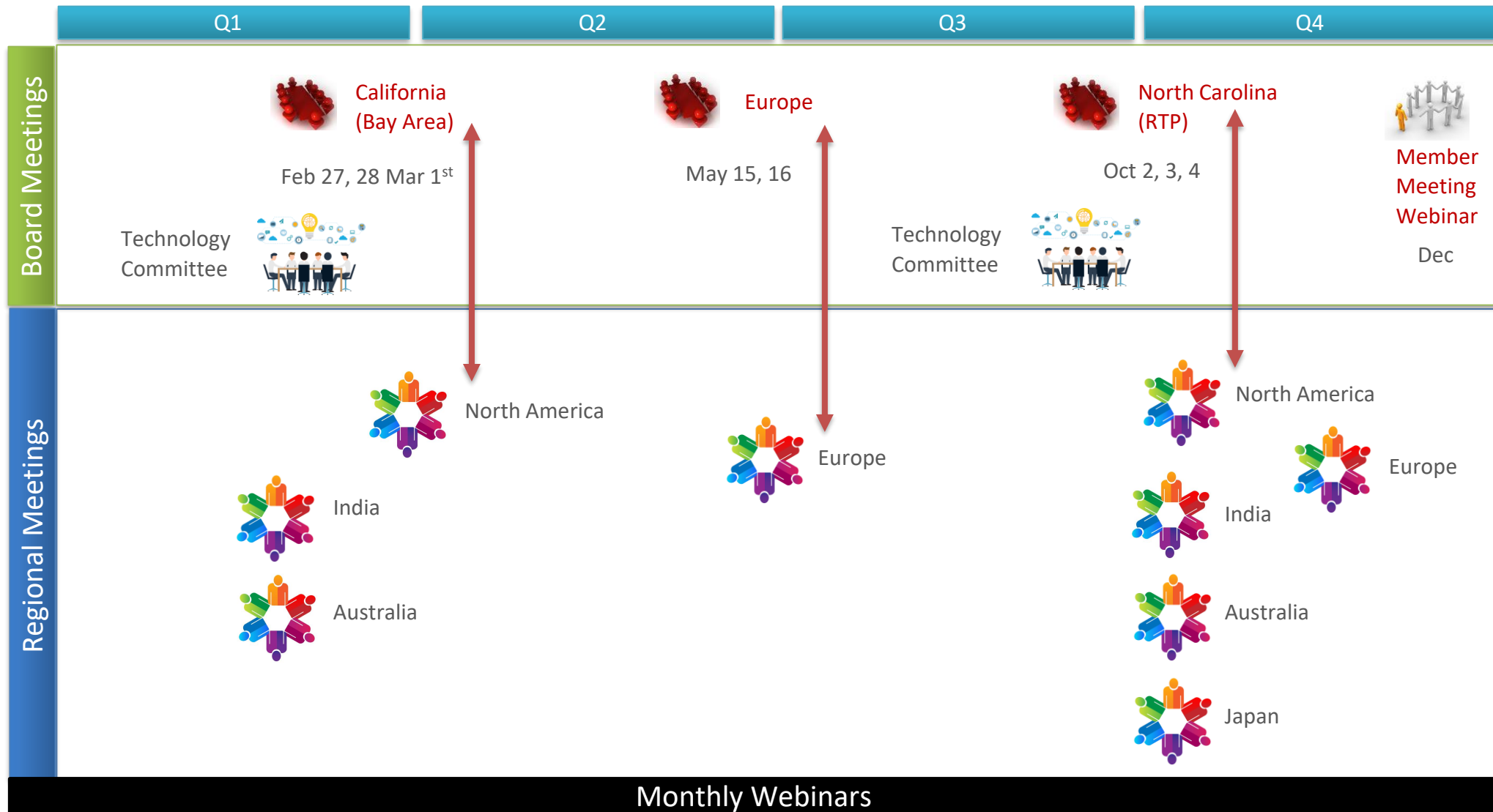❑ Symantec, Cisco, NetApp, IBM, Microsoft, Red Hat, Dell EMC, VMware

Meetings
❑ Quarterly Calls
❑ Meet face to face in 2018 (Feb and Oct)

2018 Goals
❑ Case Exchange direction and 2018 development

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2018 – Events

	Q1	Q2	Q3	Q4

Board Meetings

California (Bay Area)

Feb 27, 28 Mar 1st

Technology Committee

Europe

May 15, 16

North Carolina (RTP)

Oct 2, 3, 4

Technology Committee

Member Meeting Webinar

Dec

Regional Meetings

North America

India

Australia

Europe

North America

India

Australia

Japan

Europe

Monthly Webinars

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New TSANet Public Web

What

❑ New Design – Modern Responsive Design

❑ Content – review and update all content

❑ Simplify navigation (Task Based)

❑ Will also refresh Member Help within the Member Web

When

❑ New Web Site in place for Spring meeting (Feb 22nd)

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TSANet 25 Year Anniversary

What

❑ Social Media plans will highlight 25 years

❑ Part of new Public Website

❑ Special branding for TSW Vegas

❑ Part of branding for all meetings and communications in 2018

When

❑ Part of year-long Marketing Plan

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TSANet IN A BOX

What

❑ Everything a Member needs to be successful (In One place).   Part of new Member Help

❑ I am a new member that is Onboarding

❑ I am a new or existing member that wants to improve adoption

❑ I am a new or existing Member that wants to use added services such as Solution Support, Technology Partner Programs

When

❑ 2 Parts (Spring = Member Onboarding and Adoption), Fall (TSANet Services)

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Solution Support

What

❑ Refresh all Custom Group materials to include Solution Support

❑ Document features including the ability to work with TSANet to create custom technology solutions

❑ Enhance and document existing solution support examples (Case Studies)

❑ Improve the features of existing solution support groups (Example add Case Exchange)

❑ Look for new Solution Support opportunities by working with Regional Focus Groups

When

❑ Through the year (Based on Member needs)

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Systems Plans

What

❑ Working with Technology Committee develop 2 year plan

❑ Continue to deploy Case Exchange and gather input from users

❑ Develop next generation Case Exchange Web solution that is the default method for collaboration through the Member Web

❑ Work with key Members to enhance CRM Connectors

When

❑ November release (Piloting starts in October)

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Questions... Any Other Business...

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