

# Technology evolution is shifting the focus toward cloud-based software sales

Partner Sonar, our unparalleled database of channel partners, can help you navigate this trend.

## Software as a service (SaaS) captures almost all of the growth in software



of software sales are now as-a-service



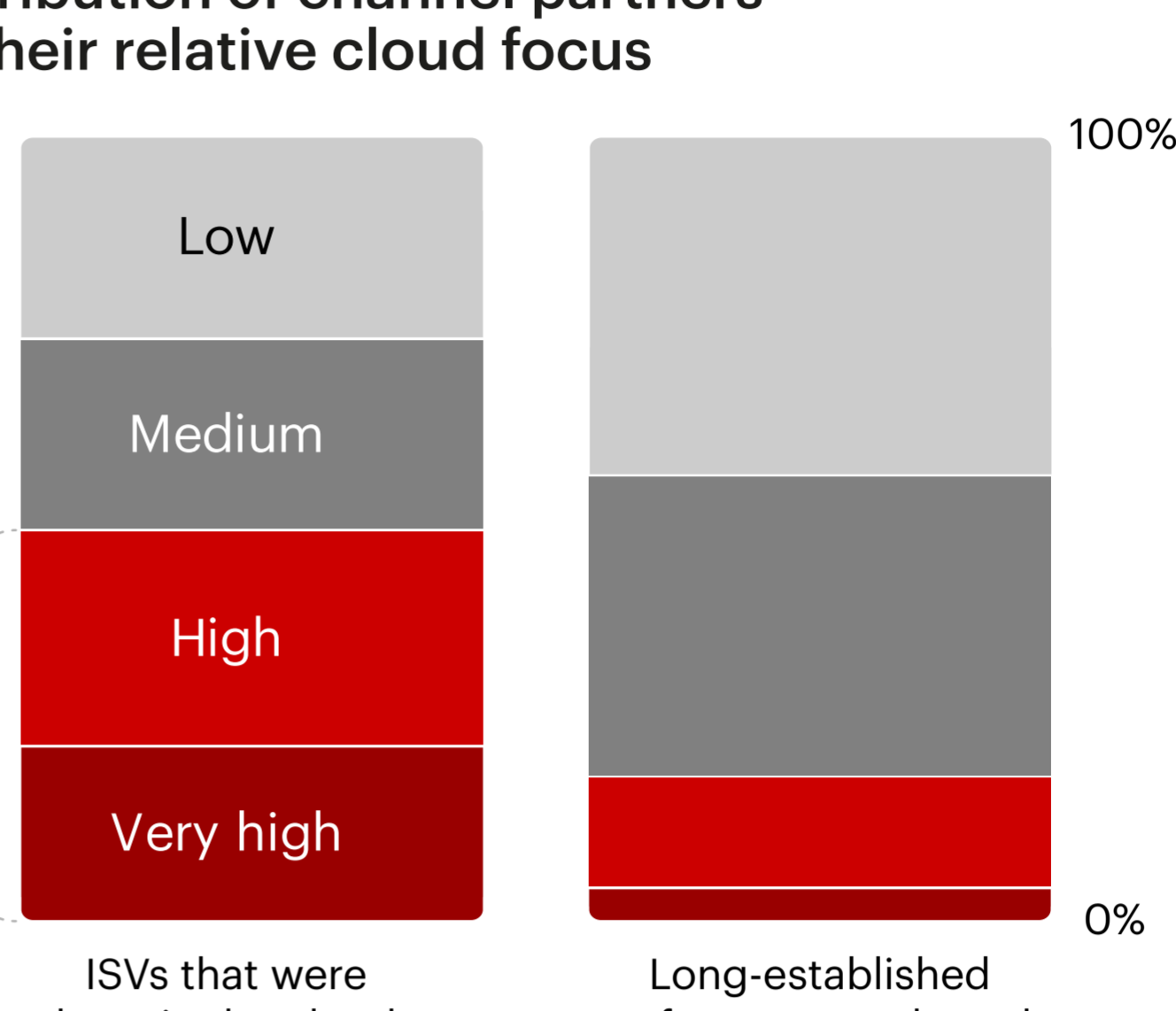
faster than on-premises software revenues

## Independent software vendors (ISVs) are looking for channel partners with advanced cloud capabilities

Distribution of channel partners by their relative cloud focus

**~50%**

of "born-in-the-cloud" ISV channel partners have a high cloud focus



Channel partners have varying levels of cloud focus, with a high proportion among newer vendors and lower proportion among more established vendors

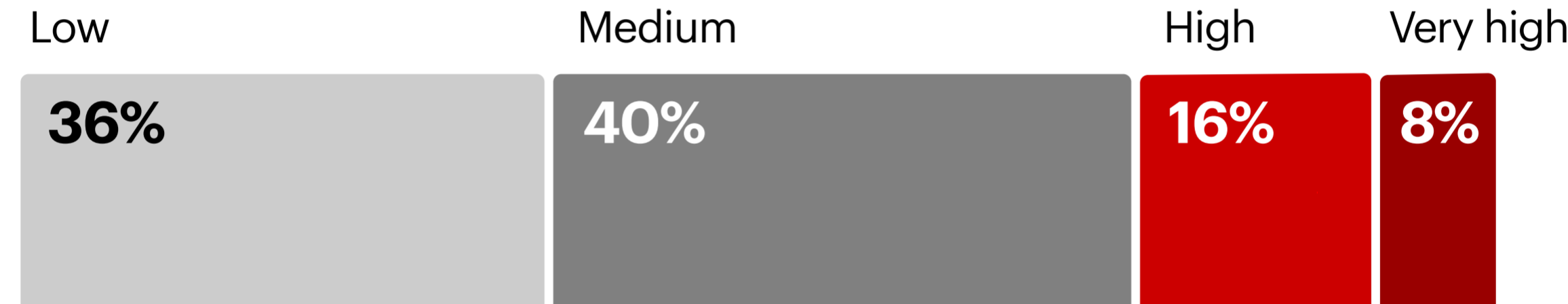
## However, it's a real challenge

to know which channel partners can make the transition, let alone find the highly cloud-focused ones



of channel partners in our database that offer cloud capabilities with a high cloud focus

Distribution of 1,000+ channel partners in Partner Sonar, by level of cloud focus\*



\*Includes cloud-focused subset of channel partners in Partner Sonar database

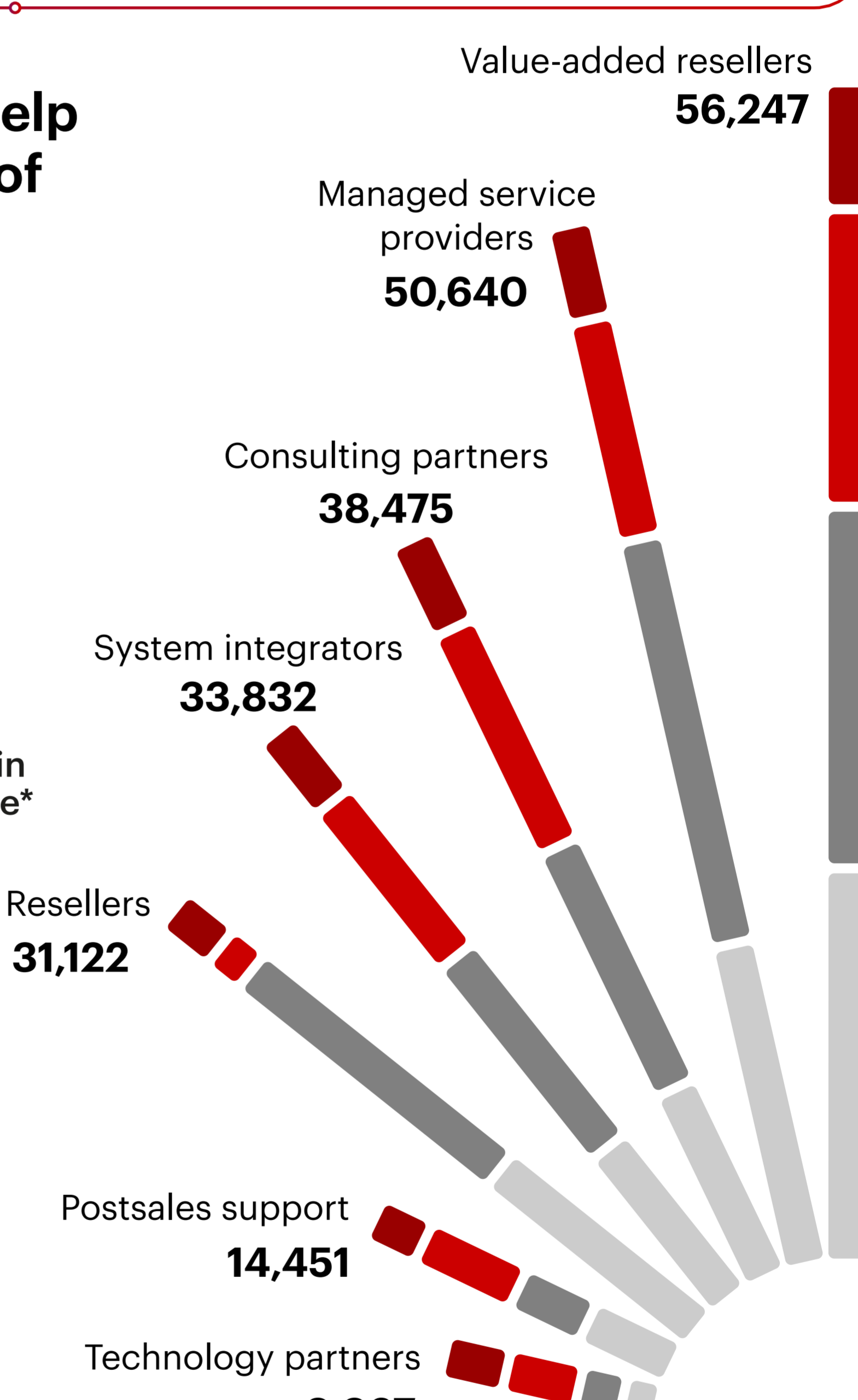
## Partner Sonar can help develop a short list of cloud-focused partners across the channel spectrum

These partners can provide more hands-on support to help underserved customers manage their cloud environment

Number of channel partners in Partner Sonar, by partner type\*

Degree of cloud focus

- Very high
- High
- Medium
- Low

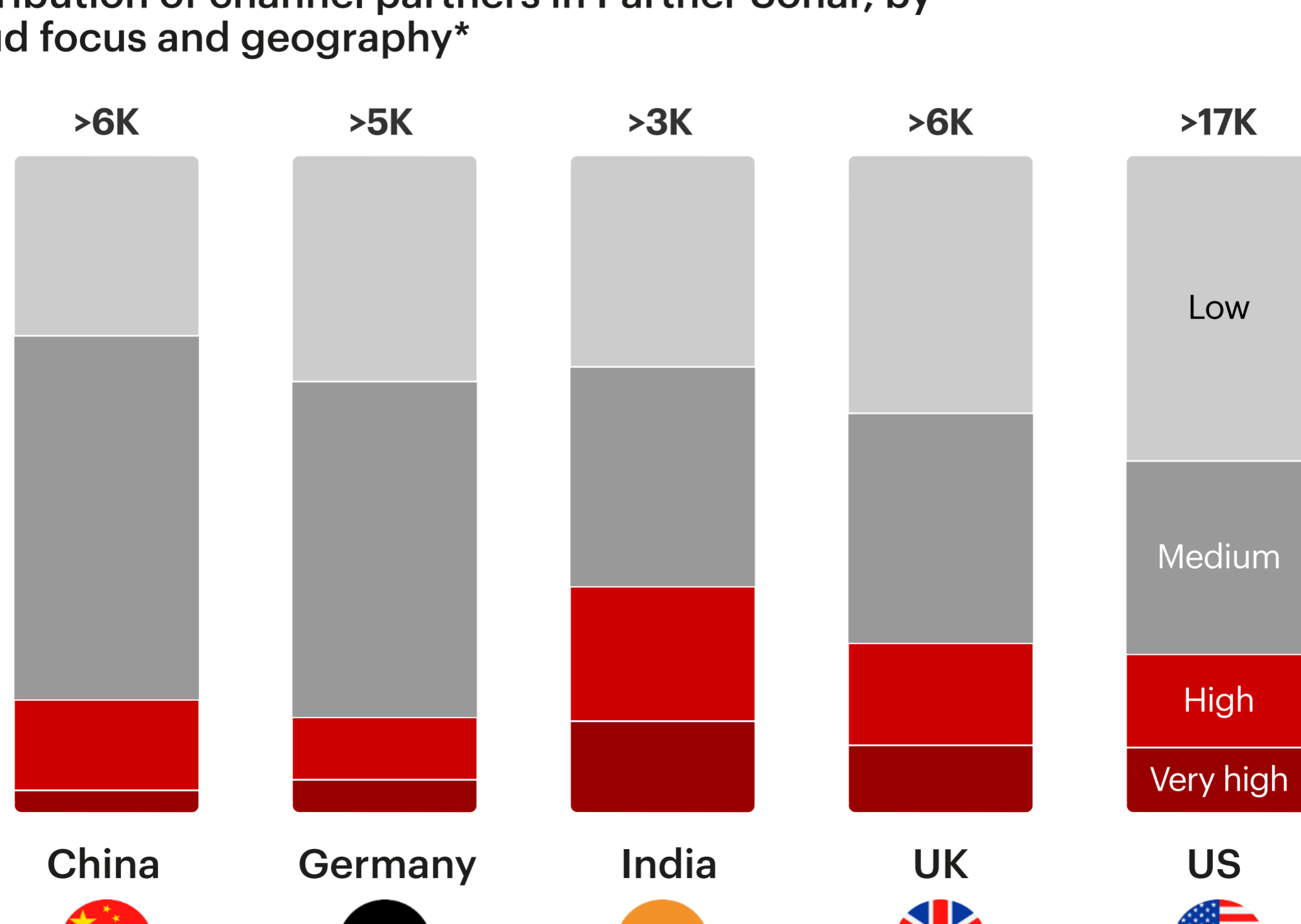


\*Includes cloud-focused subset of channel partners in Partner Sonar database

## Partner Sonar can be employed to find cloud-focused partners by a specific country and region

Regional cloud partners offer the potential to scale up in countries and regions where the ISV has lower SaaS sales coverage

Distribution of channel partners in Partner Sonar, by cloud focus and geography\*



\*Includes cloud-focused subset of channel partners in Partner Sonar database

## Partner Sonar can provide coverage of cloud-focused partners in 80+ countries