Welcome

Willkommen

Welkom
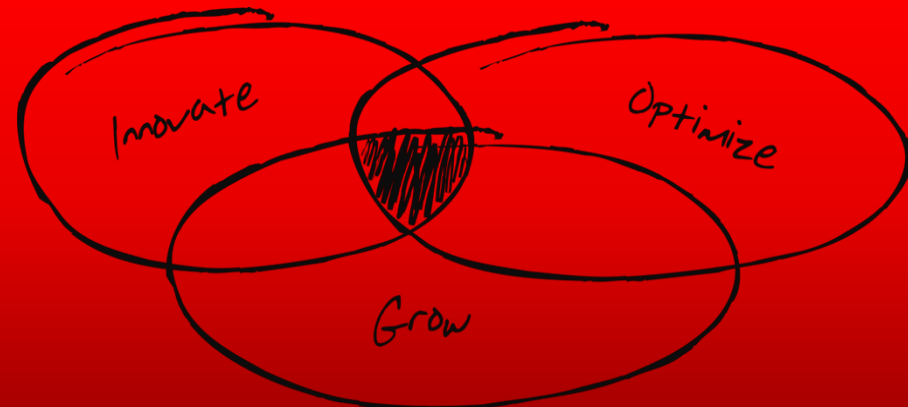
Bienvenido

Witamy

Bienvenue

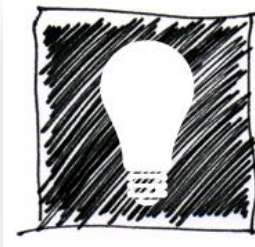**|| Parallels**™

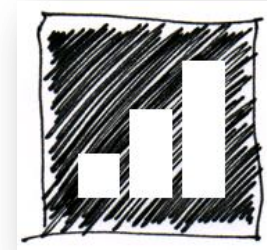*Profit* from the Cloud

Inovate

Optimize

Grow

Agenda – Munich

EMEA Partner Forum 2010 Agenda. Munich - 12. October

08:30 am - 09:00 am	Welcome Coffee / Registration / Expo
09:00 am - 09:15 am	Welcome *Stefan Hölzl, Parallels, GM, EMEA*
09:15 am - 10:00 am	Profit from the Cloud with Parallels *Stefan Hölzl, Parallels, GM, EMEA*
10:00 am - 10:45 am	The Future of Shared Web Hosting and Parallels Panels Roadmap *Craig Bartholomew, Parallels, VP, Parallels Panel Products*
10:45 am - 11:00 am	Break — Expo open
11:00 am - 11:45 am	Partnering for your Cloud success - enabling your datacenter transformation *Ulrich Flamm, Microsoft Germany – Communications Sector, Hosting Sales Manager*
11:45 am - 12:30 pm	The Virtualized Infrastructure Services Opportunity and Parallels Virtualization Roadmap *Sergey Pankin, Parallels, Sr. Sales Engineer*
12:30 pm - 01:30 pm	Lunch — Expo open
01:30 pm - 02:00 pm	The Cloud Backup Opportunity *Roland Sars, BackupAgent, Co-founder*
02:00 pm - 02:30 pm	Accelerate your growth: build the datacenter of tomorrow today *Johannes Horneck, HP, Product Manager*
02:30 pm - 03:00 pm	Profit through Partnership *Alex Peters, MessageLabs, Global Partner Services Manager* *Frank Bunn, Symantec Hosted Services, Solution Architect, EMEA CSP*
03:00 pm - 03:30 pm	Break — Expo open
03:30 pm - 04:15 pm	Delivering Messaging and Collaboration Services and Parallels Automation Roadmap *Lukas Hertig, Parallels, Director Parallels Automation Sales, EMEA*
04:15 pm - 04:45 pm	The world's fastest e-commerce offer for small hosters: Offer Cloud services by ePages and Parallels without integration hassle *Sören von Varchmin, epages, Vice President Sales*
04:45 pm - 05:15 pm	Freedom of Choice - Compose your own I.Q. *Holger Bellinghausen De Coster, Mesh GmbH, Director of Sales*
05:15 pm - 05:45 pm	Eliminate IP Blacklisting: Why outbound spam protection should be an integral part of your messaging security suite. *Alon Alter, Commtouch, Business Development Manager*
05:45 pm - 06:00 pm	Closing *Stefan Hölzl, Parallels, GM, EMEA*
06:00 pm - 07:00 pm	Cocktails/Expo/Q&A

Innovate in the cloud

Optimize for the cloud

Grow in the cloud

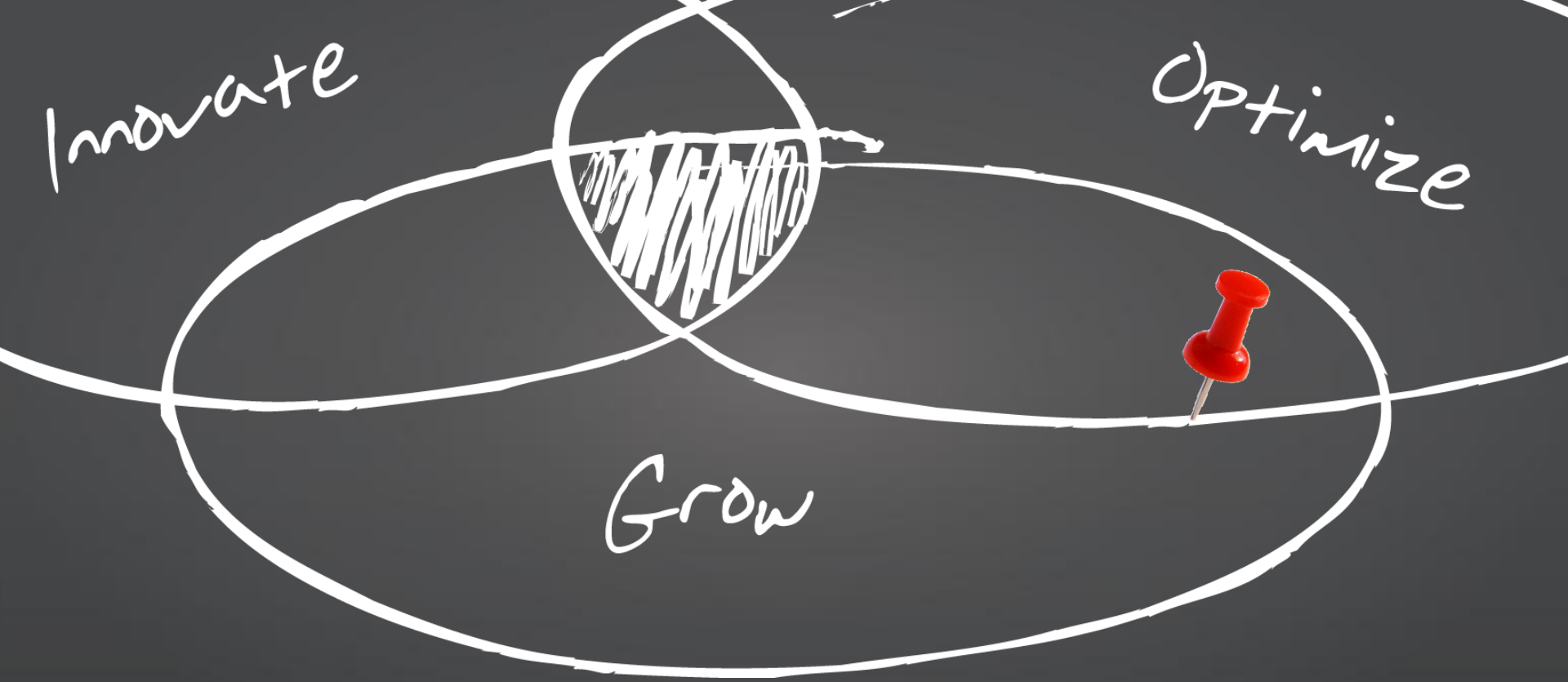# Special Thank You to Our Sponsors

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Innovate

Optimize

Grow

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EMEA Partner Forum '10

Profit from the Clouds with Parallels

Seth Nesbitt – Vice President Marketing

Parallels: Leader in Cloud Services Enablement and Desktop Virtualization

Strong Foundation

- 700+ employees worldwide
- Profitable, self-funded, 50%+ 4-year growth CAGR
- 5,000+ hosters, 700+ certified partners:
  - 150M+ domains
  - 50M+ small business and SOHO websites
  - 100M+ hosted mailboxes

Desktop Virtualization

- 2+M desktops WW

- #1 in Mac Virtualization with 73% retail new units market share (for Q2 2010)

NEW

Parallels Desktop 6 for Mac

Traditional Hosters

Go Daddy.com · HOSTWAY THE HOSTING COMPANY · THE PLANET · intergenia aktiengesellschaft · STRATO AG · Host Europe

dotster · rackspace MANAGED HOSTING · 1&1 · GMO HOSTING & SECURITY

Communication Service Providers

T··Systems· · Charter COMMUNICATIONS · kpn · PT · TELECOM ITALIA

TELE KOM AUS TRIA · tmnet · swisscom · TÜRK TELE KOM · TDC

VARs, ISVs, Distributors

APPTIX EMAIL · CALL · UNITE · YARDI · BTR ASSOCIATES · Tech Data · POINTIVITY

eEye Digital Security® · cobweb making IT simple · ApplicationIT Your applications anywhere.

The Opportunity is in Small Business

Small Business

Fastest growing segment of global economy

North America
9.6M

EMEA
22.7M

Japan
4.4M

Latin America
12.6M

APAC
23.7M

**Global Small Businesses – 73.5M
– plus over 100M Home/Small Offices**

Note:Parallels Disclaimer: Small Business = SMB < 1000 employees the rest is Large Business
* *Average small business size is less than 10 employees
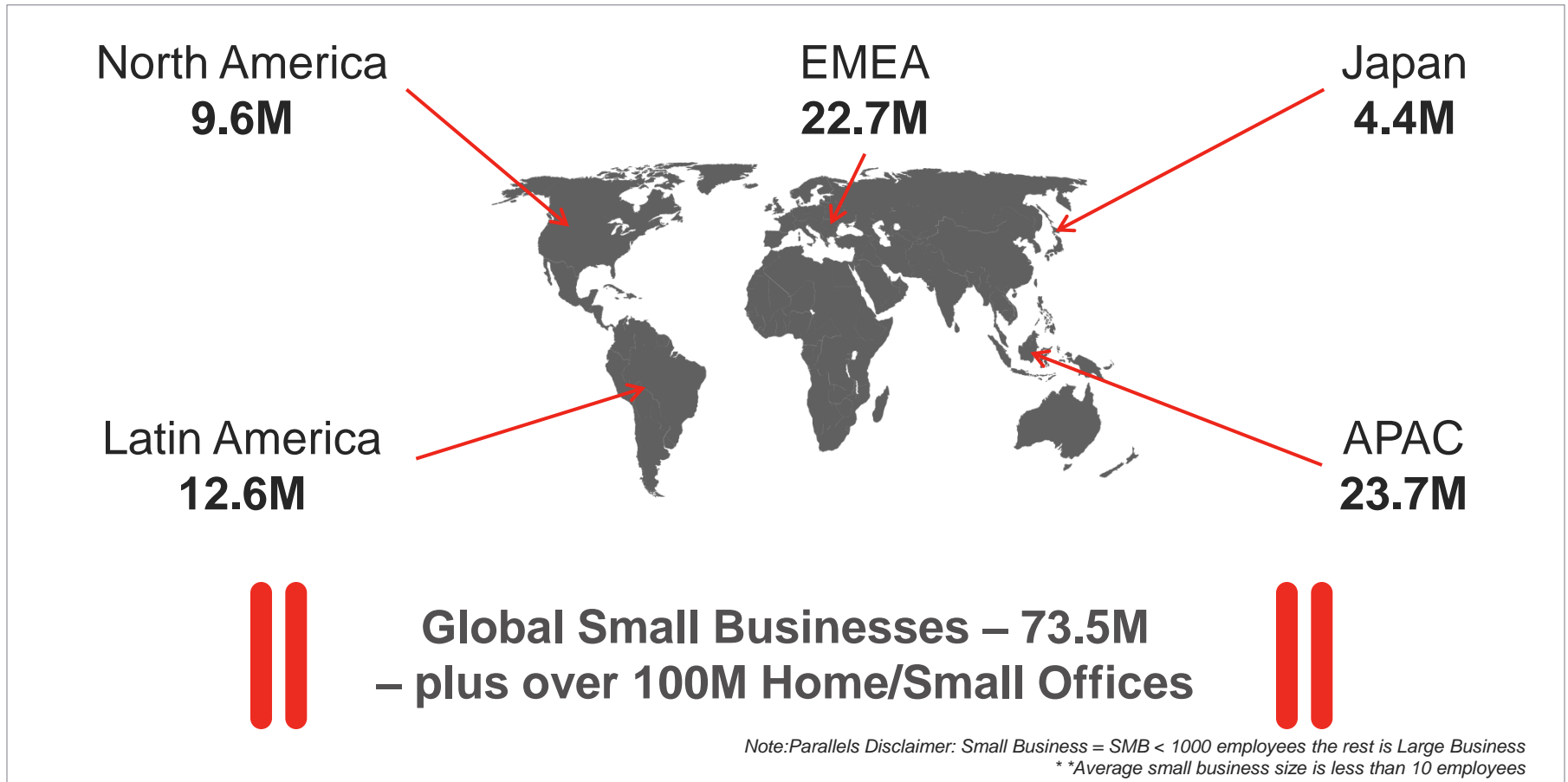
Small Business with Large IT Spend

Large

Business

Small Business 40%

< 100 empl

500-999 empl

100-499 empl 35%

$513B Total*

Source: IDC

* Excludes communication spending which arguably could be up for grabs when moving to the Cloud too with VoiP
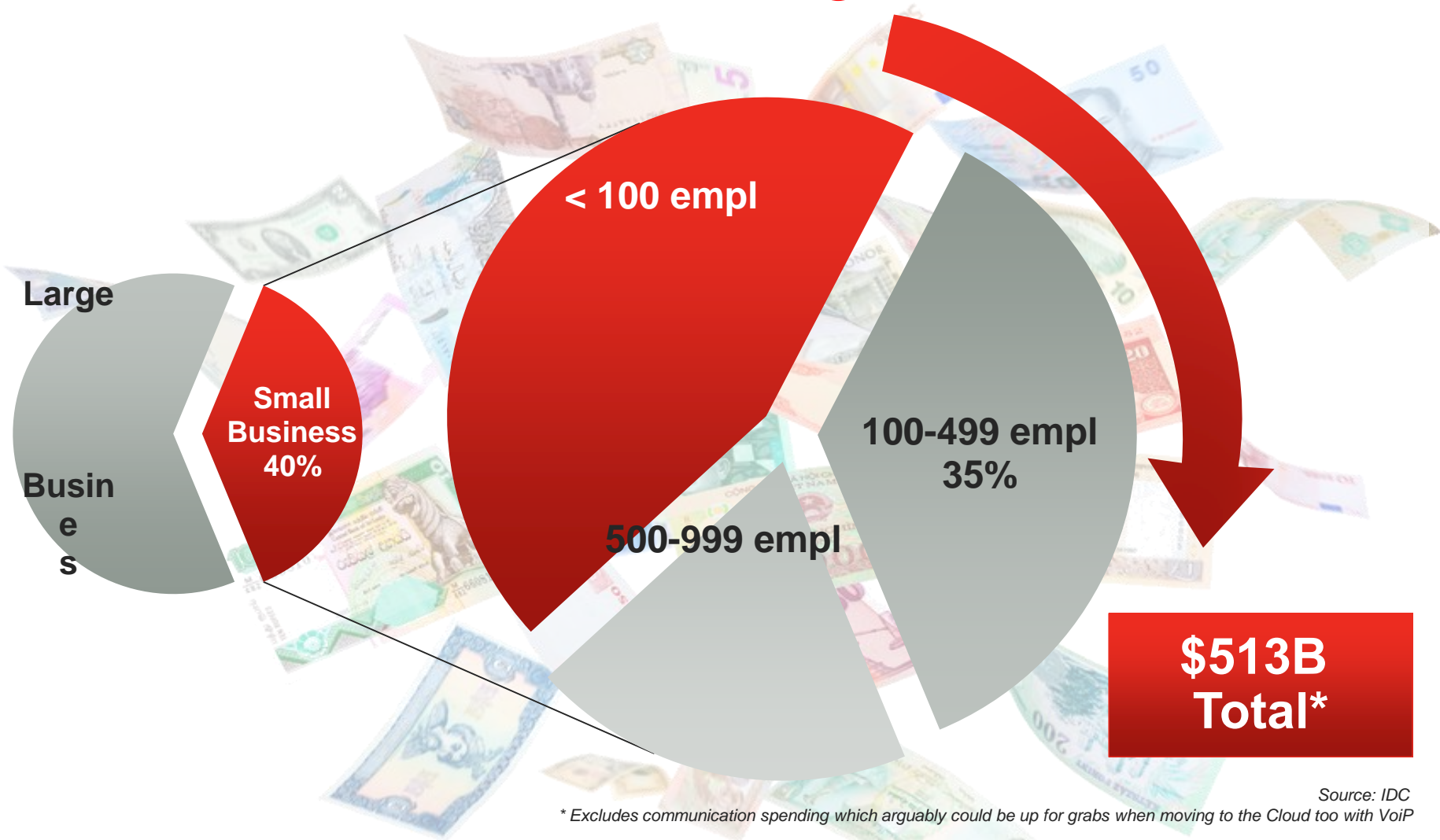
Let's Picture a Typical Small Business

Flower Dressing

3 part time employees

Web Site; E-mail; 1 PC

Flower dressing order, Payment and Contacts

IT consultant – once a month

Dog Hotel and Training

7 full time employees

2 phone lines; 4 PCs

Booking, time tracking, and contacts

IT consultant – once a week

Small Law Firm

50 employees

50 PCs and phone lines

Collaboration, time tracking, and accounting

1 full time IT – but basic and overloaded

So, Can Small Business Use **Technology**?

Technology

- Developers could use it to build **Applications**

Applications

- Integrators could use them to build **Solutions**

Solutions

- IT departments could use them to provide **Services**

Services

- **Small Business needs ~~Nanny~~ ready IT Services!**

The Cloud Makes it Possible
to Meet Small Business IT Needs!
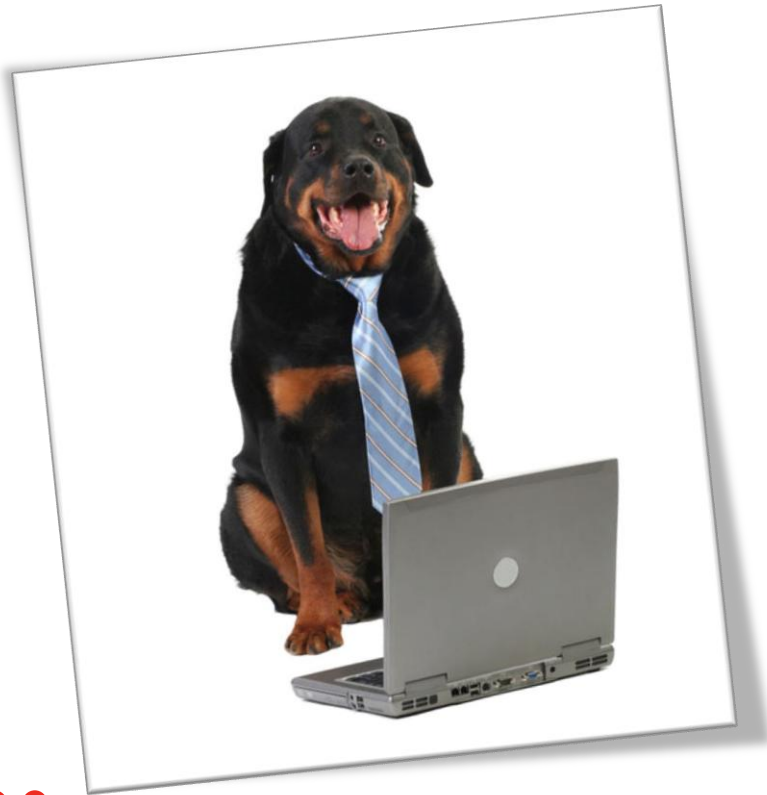
Simple

Up-Front

Cheap

Flexible

Reliable

**Cloud enables Small Business to get access
to full fledged IT services they need**

Ease of Use: from Small Business Owners

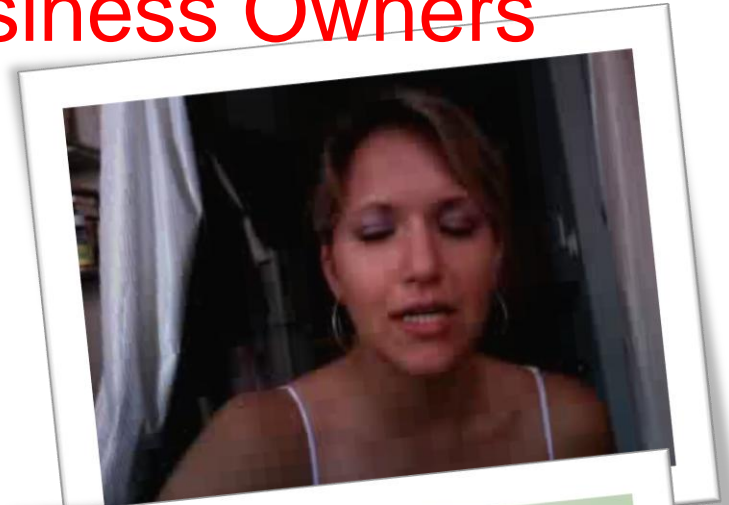Parallels Small Business Research Project

- **Kristina**
    - StarTours
    - 2 years in Travel and Tourism business

- **Andrea**
    - Wired Fashion
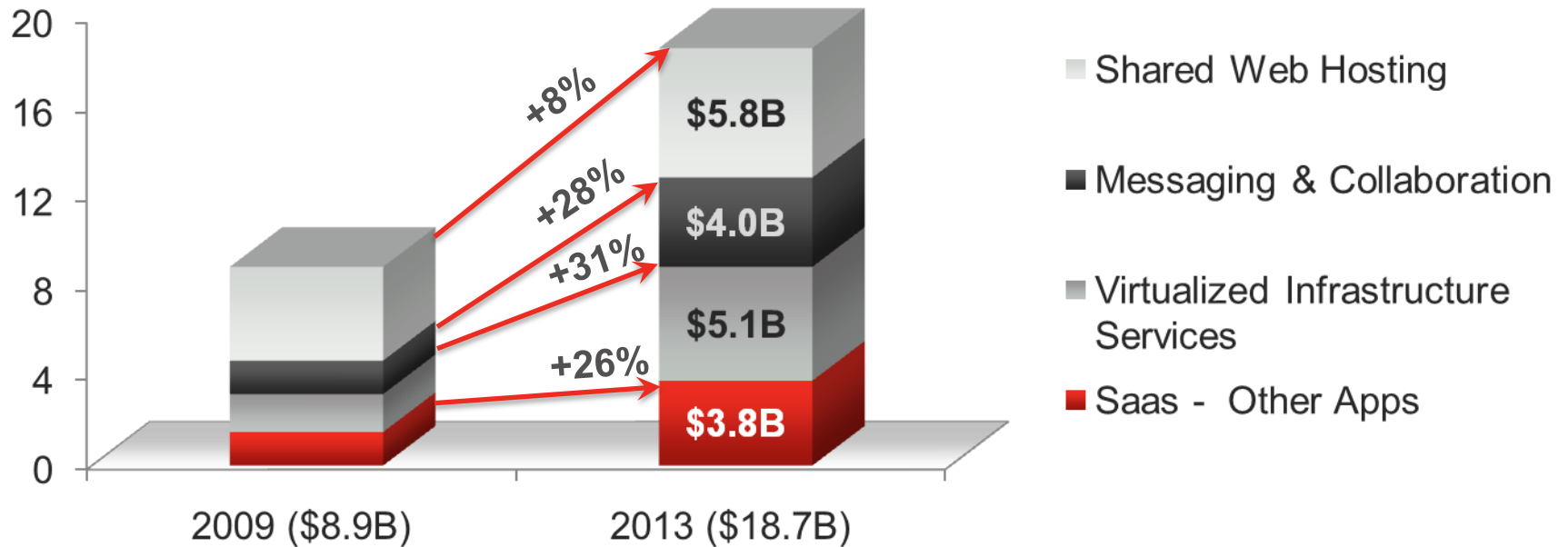   - 10 years in Fashion business

- **Michael**
    - Summit Consulting
    - 5 years in Consulting business
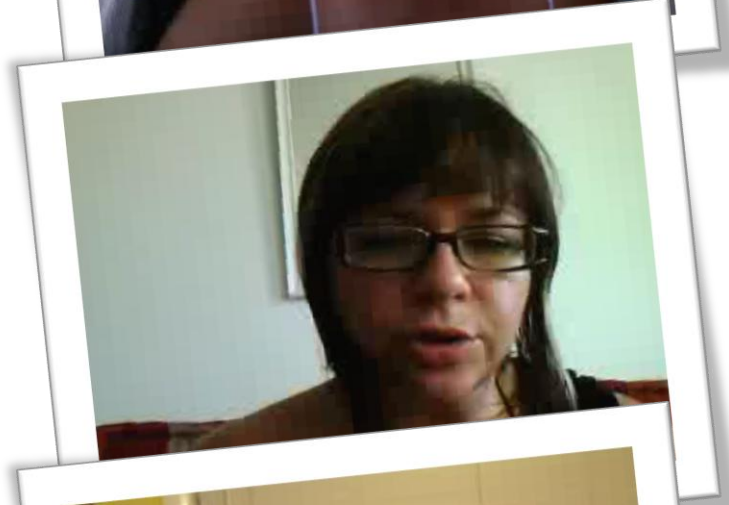
The Small Business Cloud Opportunity is Huge!
Even if Conservatively Estimated, and is Shifting

Shared Web Hosting ➡️ Messaging ➡️ Infrastructure ➡️ SaaS

Shared Web Hosting will remain the largest segment of the Cloud for Small Business even in 2013. Highest margins and absolute growth will be a healthy $1B+!

How Do You Profit from the Cloud?

Innovate

Optimize

Grow

|| Parallels™

What are the Giants Doing?

Microsoft ®

Google ™

amazon.com ®

Giants are still 3+ years away from offering full IT services for Small Business

How to *Profit* from the Cloud?

- **Small Business Cloud opportunity is HUGE**
- **The threat of giants while not immediate is CERTAIN**
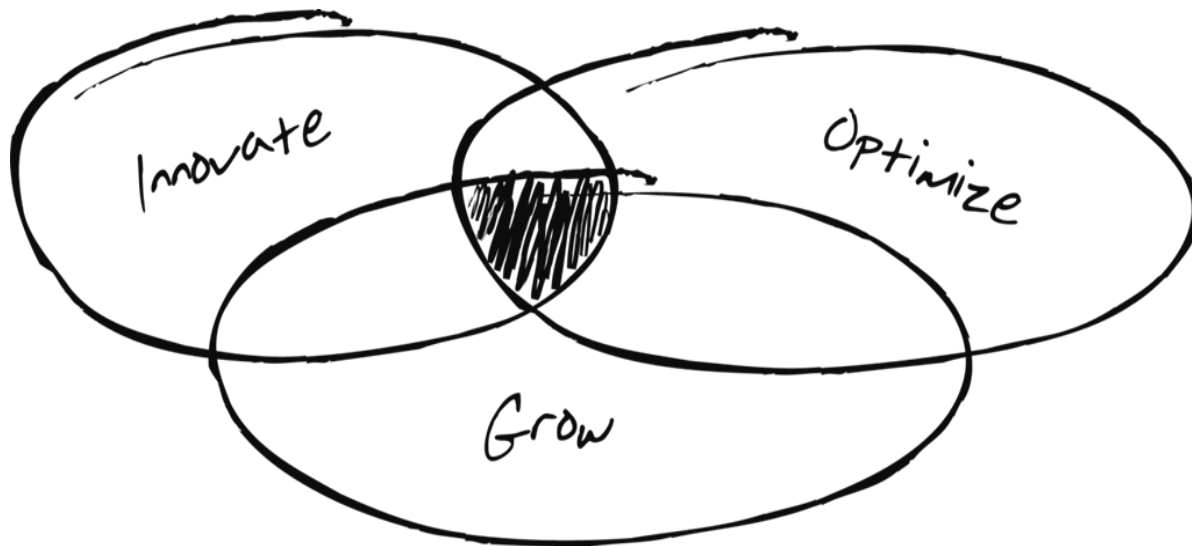- **You must move forward and stay ahead of the CURVE**

Act Now! If you don't, someone else will

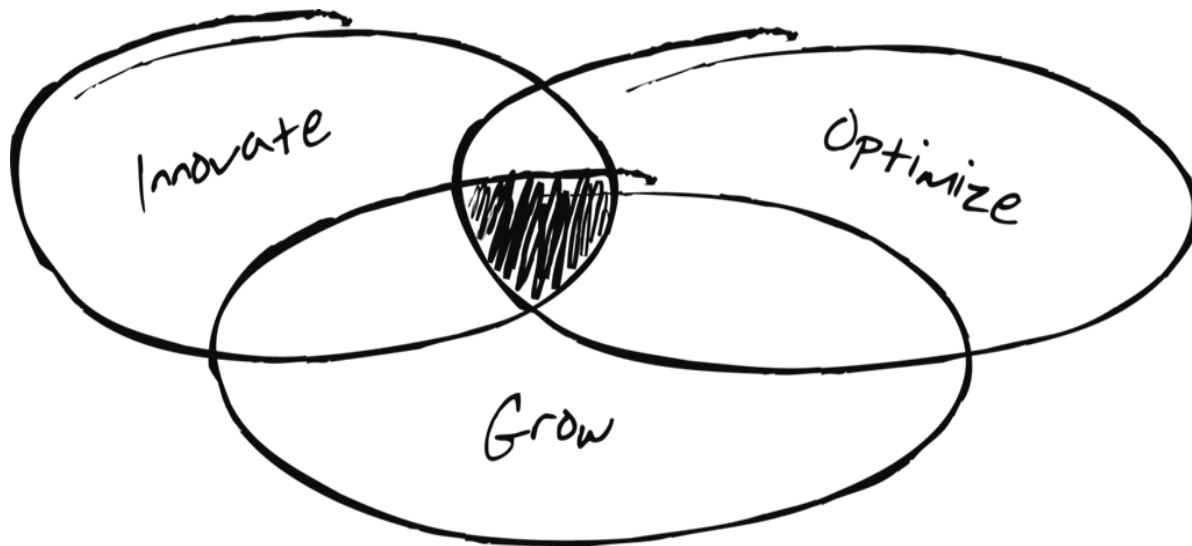# How to _Profit_ from the Cloud?

Innovate

- Develop new services
- Drive better bundled services
- Create new business models

How to _Profit_ from the Cloud?
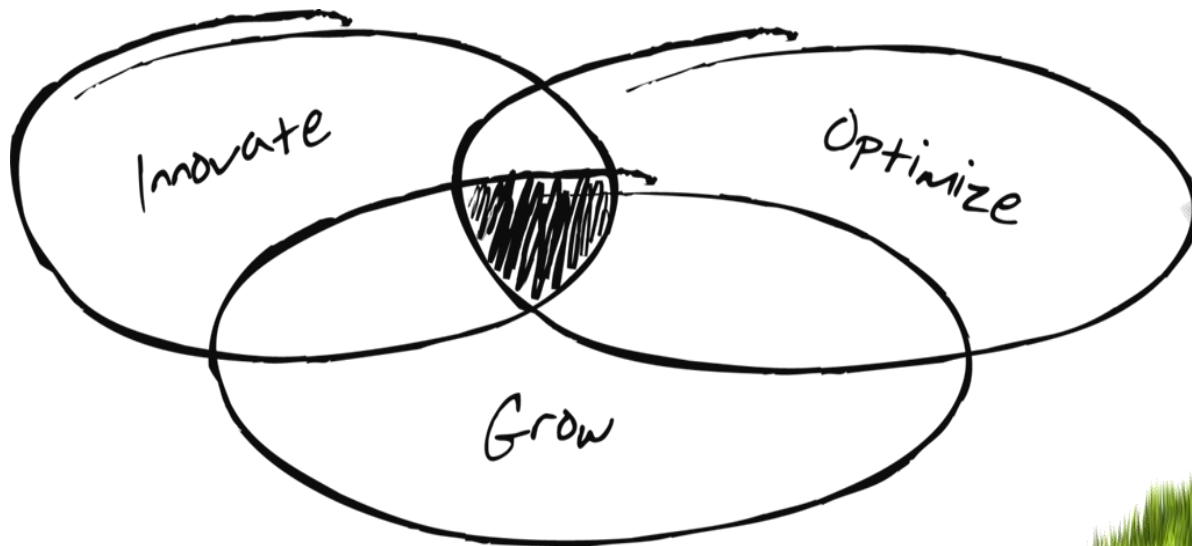
Optimize

- Improve time to market
- Create a better experience
- Optimize Operations

How to _Profit_ from the Cloud?

Grow

- Up-selling and cross-selling
- Improving offering quality
- Grow customer satisfaction

Parallels is the best Partner for you in the Cloud!

Partner
Best Enabler of Profit from the Cloud!

Innovate Optimize Grow

- **Parallels Plesk Panel**, Parallels Small Business Panel**,** Parallels Server Bare Metal, **Parallels Automation**

- **Streamlined business to Seattle**, integrated brands, products, sales & marketing & engineering & support orgs

- Hired **top talent** in – from **Amazon, VMware, Microsoft, Symantec, Dell, Amdocs**

Not just Technology but all of the Hosting Business!

- **Partner Certification** - Raise expertise of your technical staff and get direct access to 2nd level support

- **PartnerNet** - Campaigns-in-a-box for services and more!

- **Business Model Best Practices** - Churn, Financing, Sales , Support, Operations, Infrastructure, Marketing and more!

What you want from Support
We're listening to what you need

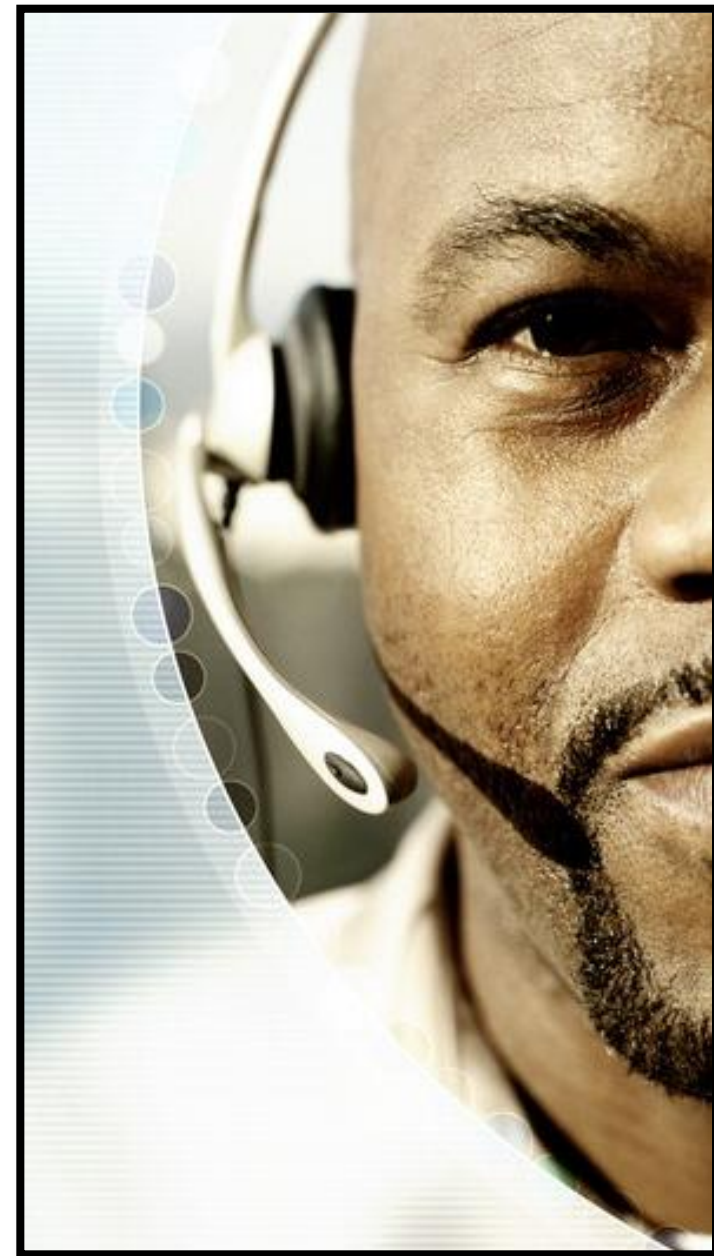### #1- Timely Resolution of your problem or question

- Our response time and time-to-resolution needs to match your businesses' sense of urgency
- We have knowledgeable Engineers but you don't always get you to the person with the right knowledge in the timeframe that you want

#2 – Doing what we say we're going to do

- Keep our commitments- follow up with you when we say we're going to follow up
- Execute with precision
- Make the hand-off process between support tiers seamless

#3- Ease of Communication

- You want someone to be available to speak to you on the phone if your systems are down
- You want it to be easy to contact us or interact with support when you need us

Systematic Process Improvement
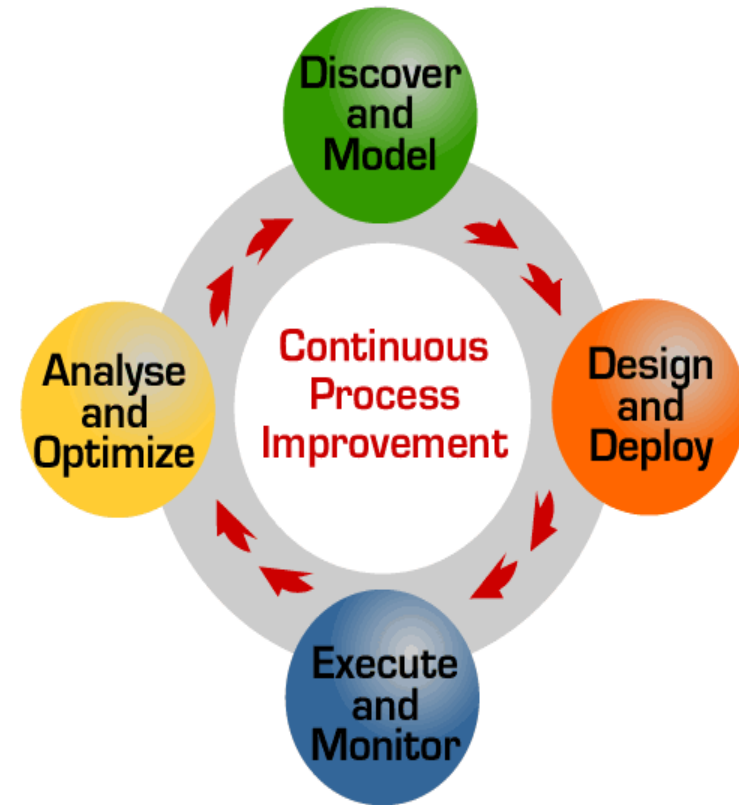
Timely Resolution of your problem

1. Triaging all incoming Tier 2 tickets
2. Improved partnerships with our development resources that code hotfixes or investigate code-level issues
3. Streamlined hand-offs between tier 1 and tier 2 of support

Keeping our commitments

1. Updates completed to our ticket management system to track commitments and send alerts when one is missed
2. Management on duty 24x7
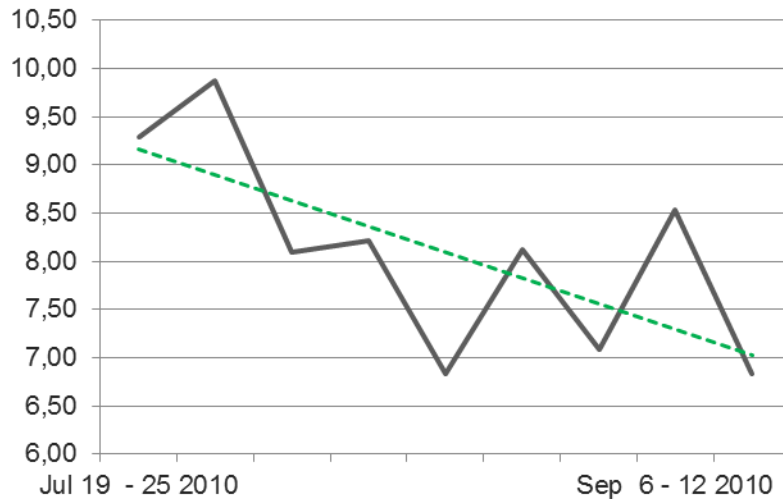3. Daily reviews of missed commitments and stalled cases

Communication

1. Training and agent development is our focus for Q3 2010 and 2011
2. New support management roles to look at all processes with fresh eyes

Discover and Model

Design and Deploy

Execute and Monitor

Analyse and Optimize
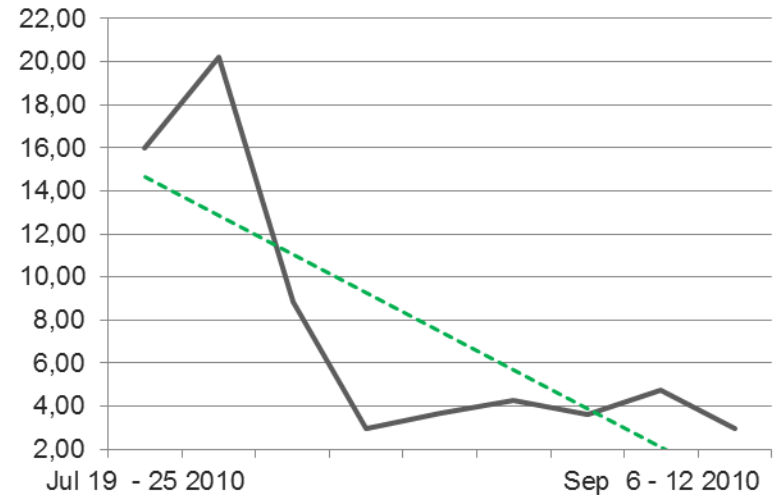
Continuous Process Improvement

Recent improvements
Triage procedure

Response time, hours Business customers

Avg. initial response time, hours Business customers

<u>Since the triage process was introduced in August 2010</u>
- Average response time has decreased by 30%
- Initial response time decreased by 85%
- Improved resolution time by 60% for our Partners since August

Focus

Enabling Profitable delivery of Complete range of Cloud Services for Small Businesses

Enabled Services

Self-Service Control Panels
Parallels Panels for Customers & Channel

Provisioning
Parallels Operation Automation

Billing
Parallels Business Automation

Virtualization
Parallels Containers, Parallels Server Bare Metal

Web Presence

Messaging and Collaboration Services

Hosted/Virtual Infrastructure Services

SaaS – Other Applications

Focus
Web Presence and Hosting

Opportunity

2009	2013
$4.2B	$5.8B

8%
Growth

Trends

- "Must offer" – foundation for growth

- Services are still evolving:
  - More non-technical users; From PHP to Joomla and WordPress

- Price stabilized but perceived competition with "free" "offerings

- Significant part of end-users is mobile and growing!

4:30pm: Parallels Plesk Panel Update by X

2010

Parallels Plesk Panel 9.5 & Parallels Hosting Suite

Parallels Plesk Panel 10 with Marketplace ★

Parallels Automation Next Generation Shared Hosting ★

Focus
Messaging and Collaboration Services

Opportunity

2009	2013
$1.5B	$4.0B

28%
Growth

Trends

- Stickiest and most strategic service when used
- Most competitive market – from Google/Cisco/MSFT to telcos and traditional hosters
- Value-add Bundles are critical to compete with "free"!
  - Traditional – AV/AS, archival, mobility
  - Collaboration – SharePoint, Web Conferencing and Project Management
  - VoIP and related including PBX, minutes, phone conference

5:30pm: Parallels Automation Update by X

2010

Parallels Automation 5.0

⬇

MS Exchange 2010 & MS OCS ★

⬇

BPOS Syndication ★

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Focus

Hosted/Virtual Infrastructure Services

Opportunity

2009	2013
$1.7B	$5.1B

31% Growth

Trends

- Highest growth
- Three end-customer segments: Business, ISVs, Online Services
- Still lots of confusion around these services and what's *really* important
- Add-ons Storage, Monitoring, Backup, DR, limited SLAs

5:00pm: Parallels Virtualization Update by X

2010 Roadmap

Parallels Virtuozzo Containers v 4.6

↓

Parallels Server for Mac Bare Metal Edition

↓

Cloud Utility Computing (C2U)

Focus
SaaS – Other Applications

Opportunity

2009	2013
$1.5B	$3.8B

26% Growth

Trends

- Sales and Marketing Tools
  - Winners so far： CRM, SEO and Social Media

- ISVs looking for new channels – take advantage
  - Syndication (if white label) or inside your datacenter

- Support, integration, **localization,** customer ownership, and **country specific applications** are challenges!

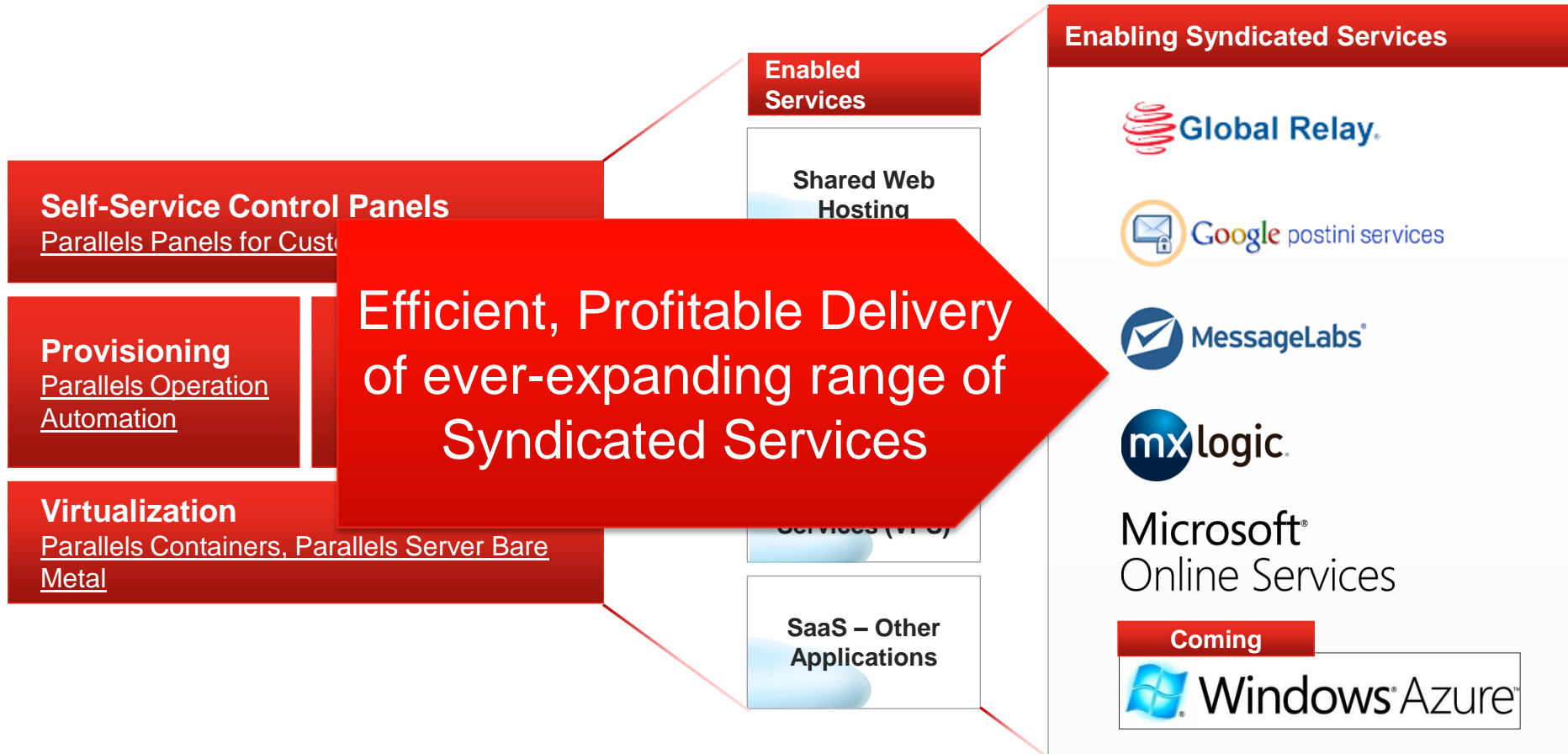**Meet and greet X on the show floor**

2010 Roadmap

Common Services Architecture

↓

Parallels Partner Marketplace v2

↓

Application Packaging Standard 1.2

Focus
Cloud Syndication to Provide **Full Services**

Self-Service Control Panels
Parallels Panels for Cust...

Provisioning
Parallels Operation Automation

Virtualization
Parallels Containers, Parallels Server Bare Metal

Enabled Services

Shared Web Hosting

...ervices (VPS)

SaaS – Other Applications

Efficient, Profitable Delivery of ever-expanding range of Syndicated Services

Enabling Syndicated Services

Global Relay

Google postini services

MessageLabs

mxlogic

Microsoft Online Services

Coming

Windows Azure

Cloud Service Provider Blueprint

Front And Back Office

Systems Integration

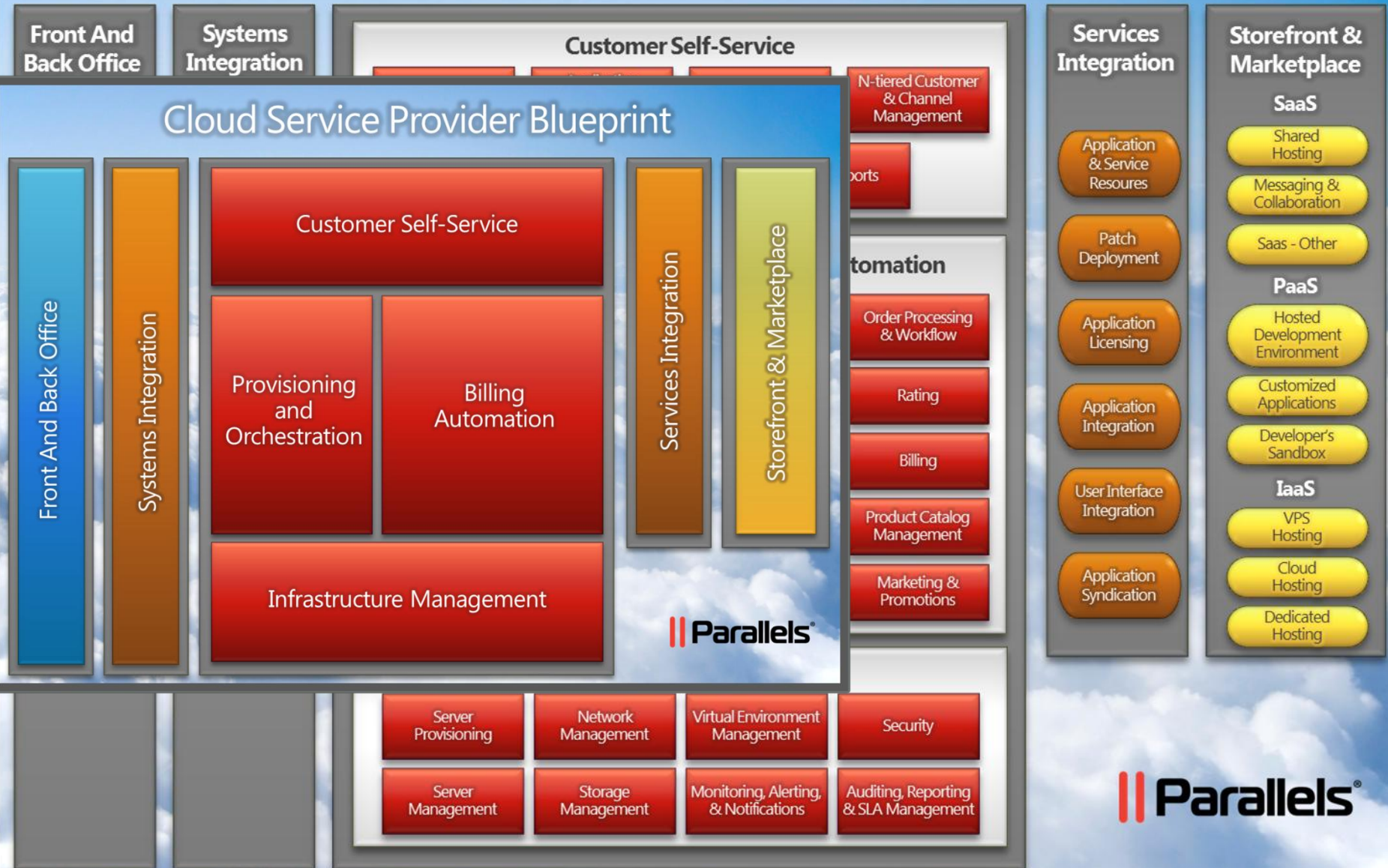**Customer Self-Service**

Provisioning and Orchestration

Billing Automation

Infrastructure Management

Services Integration

Storefront & Marketplace

‖ **Parallels**®

Cloud Service Provider Blueprint

Front And Back Office

Systems Integration

Customer Self-Service

N-tiered Customer & Channel Management

...orts

Services Integration

Application & Service Resoures

Patch Deployment

Application Licensing

Application Integration

User Interface Integration

Application Syndication

Storefront & Marketplace

SaaS
Shared Hosting

Messaging & Collaboration

Saas - Other

PaaS
Hosted Development Environment

Customized Applications

Developer's Sandbox

IaaS
VPS Hosting

Cloud Hosting

Dedicated Hosting

Cloud Service Provider Blueprint

Front And Back Office

Systems Integration

Customer Self-Service

Provisioning and Orchestration

Billing Automation

Services Integration

Storefront & Marketplace

Infrastructure Management

|| Parallels®

...tomation

Order Processing & Workflow

Rating

Billing

Product Catalog Management

Marketing & Promotions

Server Provisioning

Network Management

Virtual Environment Management

Security

Server Management

Storage Management

Monitoring, Alerting, & Notifications

Auditing, Reporting & SLA Management

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Partner to Profit from the Cloud

Innovate

Optimize

Grow

|| Parallels™

The Time to Act is Now!

Focus on IT Services for Small Business

- Opportunity is huge and Cloud is perfect for it

Profit from the Cloud!

- Become a **full service provider** to profitably take advantage of the Cloud opportunity

Partner with Parallels for profit in the Cloud!

- Leverage Parallels Service Delivery Software:
  - Parallels Server BareMetal **– Best of Both Worlds**
  - **Parallels Plesk 10** - Preview Available **NOW!**
  - Automation **w/Exchange 2010 and VoIP**: **NEW!**
  - **Service Syndication –** BPOS & More**: NEW!**
  - Parallels Automation **Next Generation Shared Hosting - NEW!**

Stay in touch

- Service Provider Blog:

  http://blogs.parallels.com/serviceprovider/

- Webinar Series

  http://www.parallels.com/webcasts/

Service Provider Newsletter:
http://blogs.parallels.com/serviceprovider/

You are invited:

Parallels Worldwide Summit 2011
February 22-24, Orlando, Florida, USA

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Profit from the Cloud

Thank You

Contact me anytime at
snesbitt@parallels.com!