## Agenda

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THE 4TH INDUSTRIAL REVOLUTION

Widespread disruption

New capabilities in demand
An Industry-led Approach to Digital Transformation
THE CLOUD IS NOT A DESTINATION
IT IS A CAPABILITY
Digital transformation
Navigating the new normal

Recent research indicates the impacts of hybrid work—and suggests approaches for the future.

80% of managers expect more flexible work arrangements post-pandemic

73% of employees want flexible remote work options to stay

54% of employees feel overworked

79% of surveyed enterprises experienced a cyber breach in the past year with an average cost of $4.72M per data breach

Source: Microsoft’s annual Work Trend Index, March 2021. Forrester Study: The 2020 state of security operations (Commissioned by Palo Alto Networks)
Reinventing when, where, and how people work

Employees expect to connect and collaborate from anywhere, on any device.

Work spaces—including the frontline—need to facilitate inclusion and productivity.

Solutions must be cost-effective and streamlined, while supporting work-from-anywhere security.
As organizations re-imagine work, the capability and flexibility of **Hybrid Work** is essential for today’s modern workplace.

58% of Microsoft employees cite **Focused work** as their reason to work from Home of the office\(^1\)

**Zero Trust** approach helps organizations ‘shield’ for data, identity & threat protection in a hybrid work world.

63% of organizations fear data leakage while working from home, intensified by 80% of data not directly governed\(^2\)
Challenges and trends

- **Diverse, multi-generational workforce**: 70% of the global workforce work remotely at least once a week (pre-pandemic).
- **Disconnected systems separate workers from data and each other**: 30% of the global workforce will work-from-home multiple days per week by end of 2021.
- **Security and compliance risks**: 63% of companies reported their data was compromised in the past year. Estimated global price tag if cybersecurity efforts do not keep pace with technological change is $90T.
- **Legacy systems hinder remote work and first line productivity**: 86% of employees and execs cite lack of collaboration for workplace failures. 60% of employees use a smartphone for work while 31% desire one.

**COVID-19 IMPACT**
- 80% of employers plan to increase WFH programs.
- These changes are expected to yield ~$11K savings per year per employee.
- FBI reports 4x increase in cybercrime attacks.
- 46% of business have experienced at least 1 security incident.
Teams is the fastest growing app in Microsoft history

- 270+ million monthly active users
- 91% Fortune 100 companies use Teams
- 53 languages are supported in Teams
- 500k organizations use Teams
Rich end-user experiences with Office + Teams

Meet from anywhere
Collaborate with others
Improve experience

75 hours
Saved per employee per year with increased productivity due to the collaboration features in Teams

80%
Time reduction required to start meetings with Microsoft Teams Room Managed Services

40%
Pre- and post-meeting time saved with Surface Hub

426%
return on investment
A new hybrid work reality needs new principles

Verify explicitly

Use least privileged access

Assume breach
Our global team of security professionals utilizes cutting-edge artificial intelligence to process **trillions** of raw security signals, which generates **billions** of complex predictions and **millions** of automated actions to protect customers and make the internet a safer place.

This is the Microsoft security difference.
An increasingly large threat landscape

230% Increased in password spray attacks in 2020\(^1\)

78 GB of data is uploaded monthly to risky apps by the average enterprise\(^1\)

30B Thwarted security attempts

1/3 of all attacks on enterprise accounts involve phishing\(^1\)
What does Intelligent Security look like?

Microsoft 365
- Azure AD Premium
  - Azure AD Identity Governance
- Microsoft Defender for Cloud Apps
- Microsoft 365 Defender
  - Microsoft Defender for Endpoint
  - Microsoft Defender for Office 365
  - Microsoft Defender for Identity

Microsoft Information Protection
- Unified Labeling Client and On-premises Scanner
- Microsoft Data Loss Protection

Insider Risk Management
- Communication Compliance
- eDiscovery & Audit

Built-in experiences
AI & Automation scale
Integration across categories

Edge to Cloud
Multi-cloud
Security
Component and access management
Cloud security
Threat protection
Compliance
Microsoft Security
Microsoft Identity & Management
Multi-platform
Microsoft
Built-in experiences
AI & Automation scale
Integration across categories
Microsoft’s Zero Trust enabling technologies

- **Identities**
  - Azure Active Directory
  - Microsoft Defender for Endpoint
  - Devices/Endpoints
  - Microsoft Endpoint Manager

- **User requests access to resource**
  - Intersectional policy assessment (context, risk)
  - App and/or device health and security verified

- **Policy enforcement**
  - Azure AD Conditional Access

- **Data**
  - Microsoft Information Protection

- **Apps**
  - Microsoft Cloud App Security

- **Infrastructure**
  - Azure Security

- **Network**
  - Azure Networking

- **Intelligent and automation**
  - Azure Sentinel and Microsoft Defender XDR
  - Network security verified
  - Route through CASB
  - Classify, label, encrypt

- **Network security verified**
  - Microsoft Cloud App Security
  - Microsoft Defender for Endpoint
Modern Work Licensing
Microsoft 365 delivers new value

Sample of new products and capabilities added since launch
## Enterprise Agreement or Cloud Solution Provider

<table>
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<tr>
<th>Plan</th>
<th>Features</th>
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<tr>
<td><strong>Office 365 E1</strong></td>
<td><img src="image" alt="Office 365 E1" /></td>
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<tr>
<td><strong>Office 365 E3</strong></td>
<td><img src="image" alt="Office 365 E3" /> Windows 11 Enterprise E3</td>
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<td><strong>Office 365 E5</strong></td>
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<td><strong>Microsoft 365 E3</strong></td>
<td><img src="image" alt="Microsoft 365 E3" /> Enterprise Mobility + Security</td>
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**Microsoft 365**
Microsoft 365: A Powerful solution for your enterprise

Apps included in Microsoft 365 E3

- PowerPoint
- Word
- Excel
- OneNote
- Microsoft Teams
- Publisher (PC only)
- Access (PC only)
- Outlook
- Exchange
- Windows
- SharePoint
- Yammer
- Viva Connections
- Viva Insights
- Forms
- OneDrive
- Stream
- Sway
- Lists
- Lens
- Whiteboard
- Visio
- To Do
- Bookings
- Power Apps
- Power Automate
- Power Virtual Agents

Apps unique to Microsoft 365 E5

- Phone System
- Audio Conferencing
- Power BI Pro

- Identity and access management
- Threat protection
- Unified endpoint management
- Data protection
- Cloud security
Should I consider Suite or Standalone?

Microsoft 365 E3 ($36)
- Security ($12)
- Compliance ($12)
- Audio Conf ($4)
- Phone System ($8)
- Power BI Pro ($10)

Sum Total ($82)

Microsoft 365 E5 ($57)

Suite value
(30% savings)
Value vs Market solutions

Forrester Consulting Study

Organizations experience total cost of ownership savings when moving from their on-premises solutions to Microsoft 365. They also find value in consolidating and eliminating solutions from multiple vendors onto a single platform and by reducing the necessary support for this solution.

Examples of multi-vendor standalones

- Advanced BI ($40)
- Cloud PBX Audio Conferencing ($15)
- Compliance Management (Search and eDiscovery, Auditing (Advanced), Insider Risk Management, Access Control Information Protection and Governance $33)
- Identity and Access Management Intrusion detection, investigation, prevention, and threat intelligence Email protection Endpoint Protection and Response Cloud Access Security Broker ($30)

Microsoft 365 E5 ($57)

$118* PER USER

$61 PER USER

$57 PER USER

Office 365

*X Multi-vendor prices are based on publicly available estimated prices for other vendor solutions and are illustrative.
Cost savings framework

- **Vendor license cost consolidation**
  Consolidate in a platform v/s buying standalone for each capability

- **IT administration and deployment savings**
  Manage IT better thus enabling IT to transition to higher-value activities

- **Reduce total cost of risk**
  Reduce breaches and enhance privacy/remediation

- **Physical and T&E cost displacement**
  Reduce hard costs, e.g., real estate, utilities, travel through secure remote work

- **Save on automation and process improvements**
  Transform business processes using AI while increasing productivity

- **Capex to Opex cash flow**
  Optimize cash flow management by moving payments to Opex
Where to begin your Modern Work transformation

- Evaluate where you are right now versus **where you want to be**
- Use an iterative approach centered around **employee experiences**
- Focus on key transformation areas:
  - Secure and Managed Platform | Remote Work | Employee Experience | Organizational Agility | Firstline Empowerment

Establish your vision  
Define your journey  
Go Platform  
Streamline/Innovate in your transformation
Our customers are realizing their **Modern Work** vision

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<th>Professional Services</th>
<th>Financial Services</th>
<th>Government</th>
<th>Health</th>
<th>Manufacturing</th>
<th>Retail</th>
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<td>Five Years Out</td>
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For a Leaner World
Microsoft invests in your transformation journey

**Solution Assessments**
Move to the cloud with confidence through a deep analysis based on your situation

**Trials**
We know it’s important to try before embarking on new journey. You can take advantage of our trial programs to get started
- Office 365 E5 trial
- E5 Security & E5 Compliance trial
- Full suite: Microsoft 365 E5 trial

**Customer Immersive Experience events**
A facilitated, hands-on experience which allows you to test-drive the latest Microsoft solutions in a live cloud environment

**Hybrid Work, Employee Engagement & Security Workshops**
Choose from our portfolio of free workshops to address the unique collaboration and security needs of your organization

**Deployment Assistance**
FastTrack helps organizations accelerate deployment, migration, and adoption of their Microsoft 365 subscriptions at no additional cost

Learn more >
Thank you