



Top Marketing Influences on Enterprise Cloud Solutions Buyers

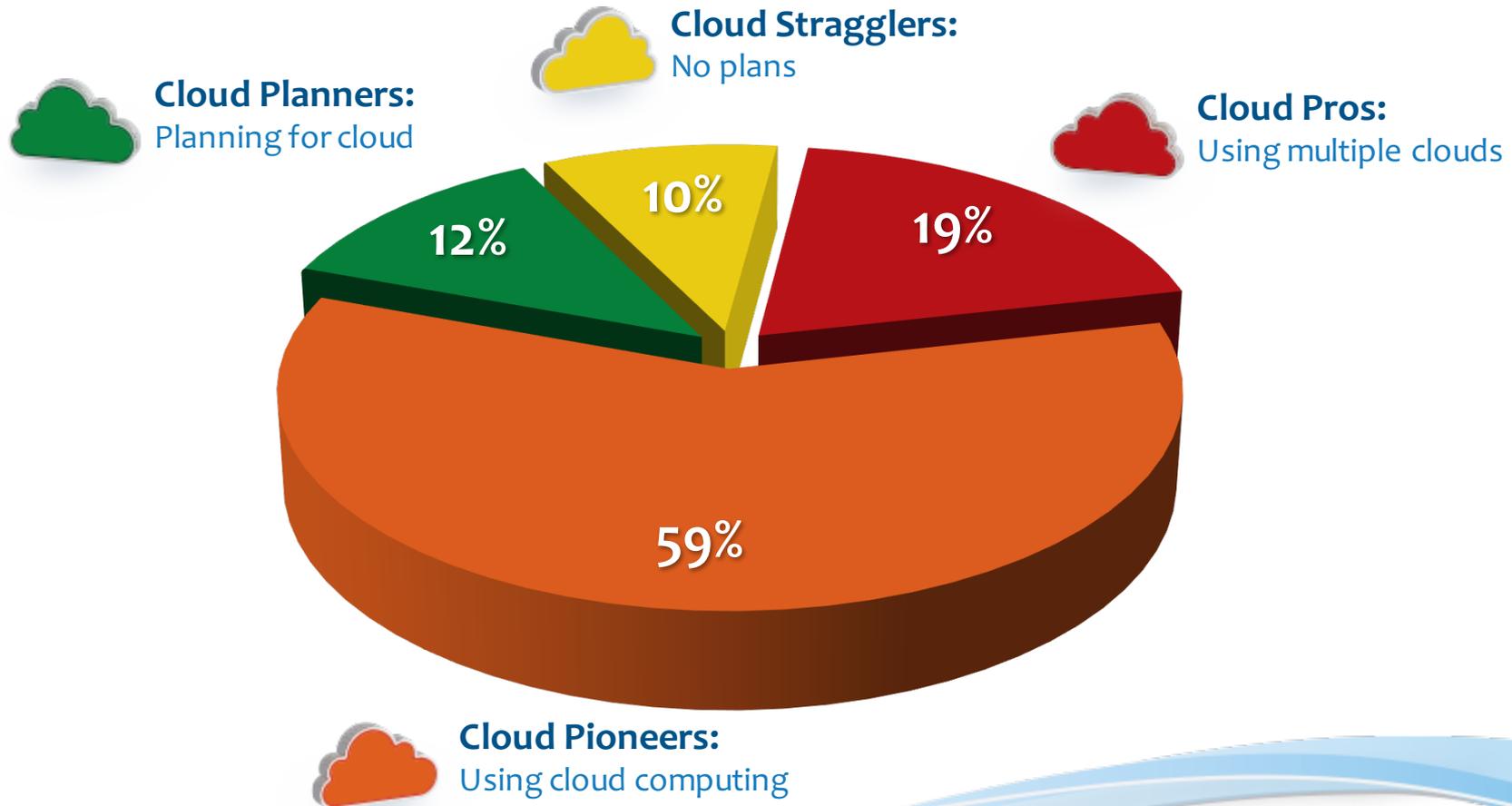
The Continuing Cloud Computing Evolution

Goal

Better understand large and medium-sized enterprise (LME) cloud solutions buyers and segments



LME cloud solutions market has 4 key segments



S: For each type of cloud deployment, we'd like to know if it's currently in production, in trial, is planned in 24 months? N=96



Survey asked about top 2 ways (out of 14 items) a participant learns about cloud solutions; the first response, with nearly half of all participants, was “other IT professionals”



The list of influences

Top 3 on all cloud buyers are peers, trade press and vendors



Q: Which 2 sources do you rely on the most to learn about IT products and services? N=96



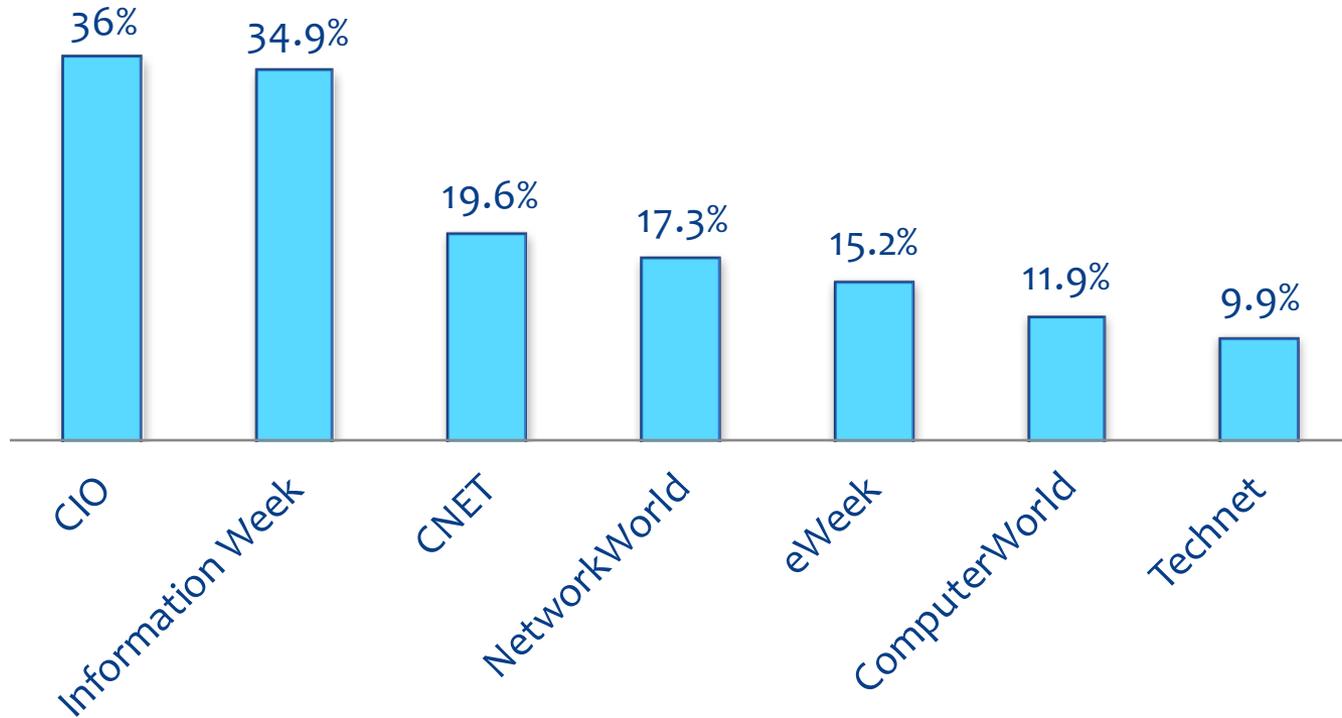
“Word of mouth”

Even technologists, who use technology to learn about and buy technology, still learn from other people



IT magazines and web sites very important

Led by *CIO & Information Week*, 62 different trades mentioned



#3: Trade Press

Q: Please name the IT magazines and web sites you rely on most. N=96

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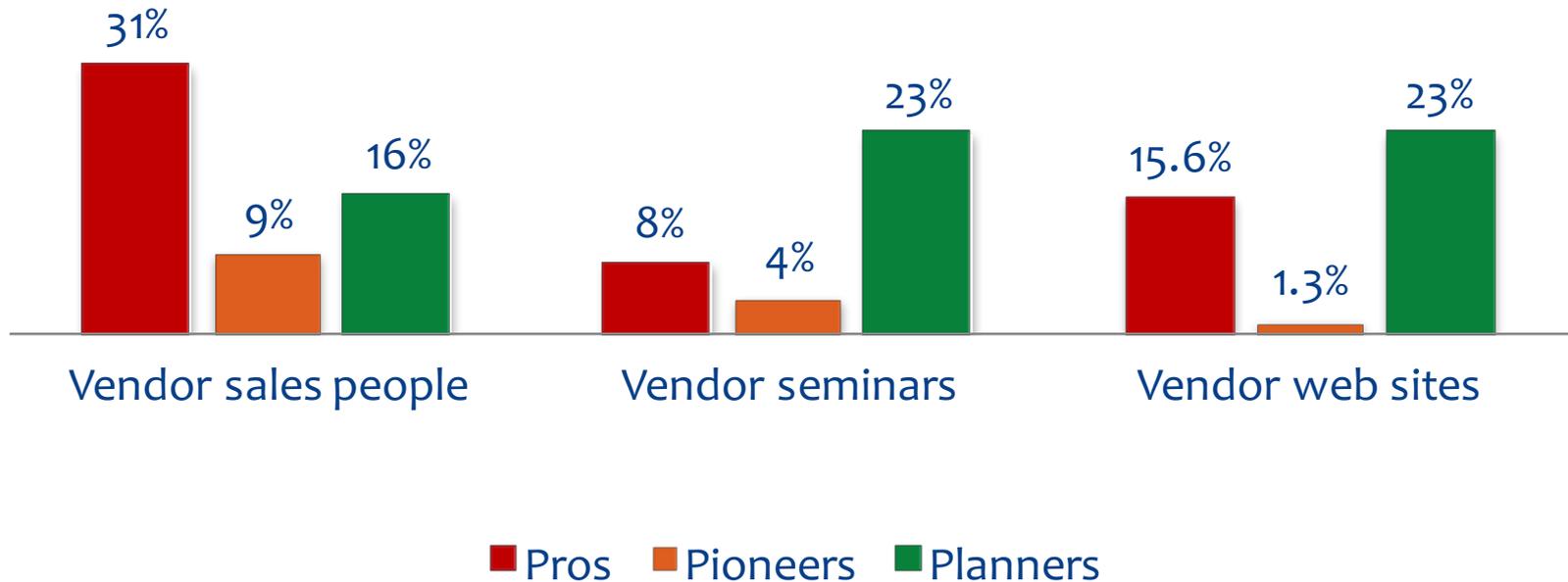
Trades and number read differ by segment

Pros read trades less than other segments

Pros	Pioneers	Planners
CIO	Information Week	TechWeb
Network World	CIO	CRM
Information Week	eWeek	Info World
		Slashdot
		Experts Exchange
		CIO
On average- 1	On average - 2	On average- 2.4

Vendors play strong role

Each segment responds to different vendor influences



#4: Vendors

Top vendor web sites are Microsoft and IBM



Cloud Pros



Cloud Pioneers



Cloud Planners

1

Microsoft (29.5%)

Microsoft (18%)

Microsoft (40.2%)

2

IBM (11.5%)

IBM (10.8%)

IBM, EMC, Cisco, &
VMWare (6.6%)

3

EMC (5.8%)

Cisco (9%)

4

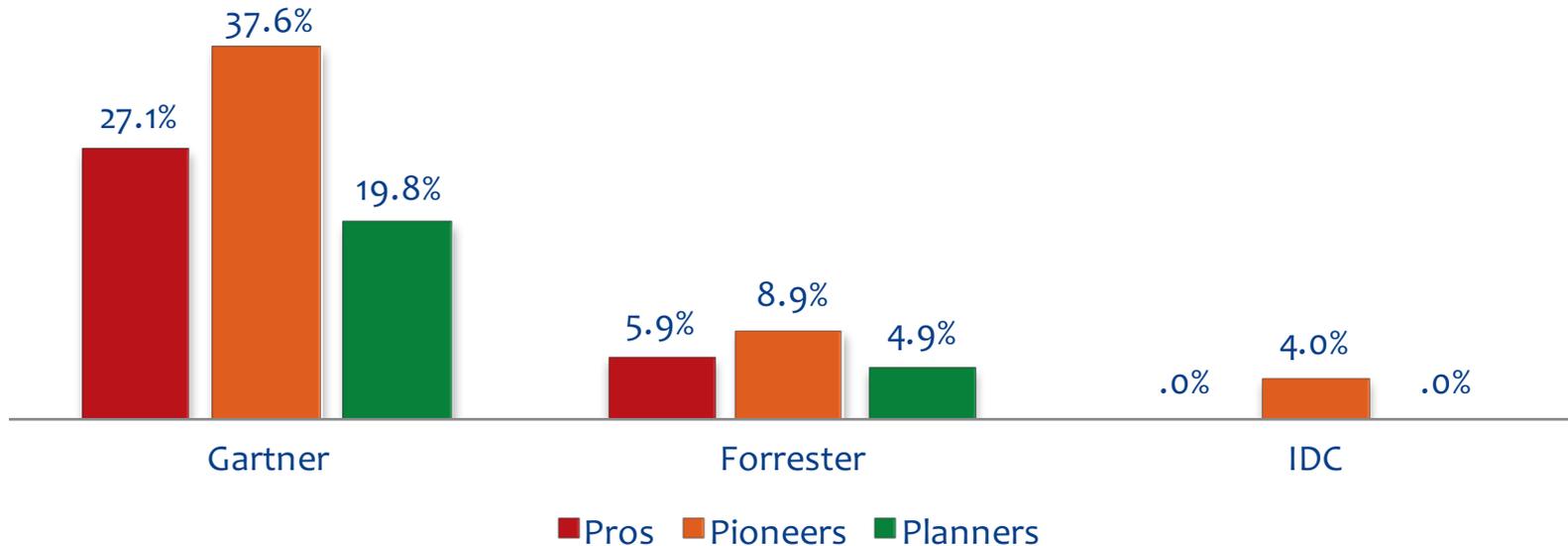
Cisco (5.8%)

AWS (9%)



IT analyst firms have waning influence

Only Gartner has significant impact



#5: IT Analysts

Q: Please name the IT analyst firms you rely on most. N=96



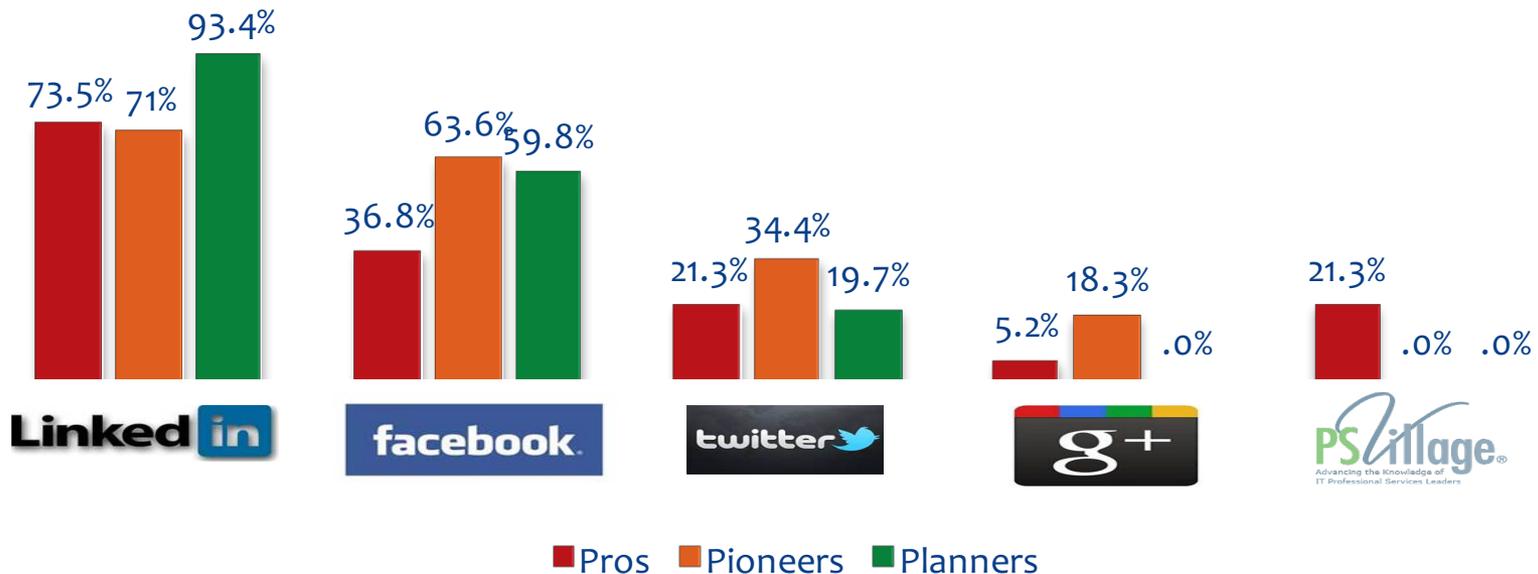
Webinars & trade events—both arguably extensions of vendor influence & learning from other IT professionals

#6 and #7



Social network sites are emerging

- Pros rely most on LinkedIn and least on Facebook
- Pioneers nearly equally likely to use both LinkedIn and Facebook
- Pioneers most likely to use Twitter



#8: Social networks

Q: Please name the social network sites you use? (n=78)



Summing up

Influence mix is different for each segment



Cloud Pros



Cloud Pioneers



Cloud Planners

1

Vendor web sites, sales,
Seminars (46.3%)

Other IT pros within
firm (53%)

Vendor web sites, sales,
and seminars (56.6%)

2

Other IT pros outside
firm (42.5%)

IT magazines & web
sites (43%)

IT magazines & web
sites (39%)

3

Other IT pros within
firm (31.1%)

Other IT pros outside
firm (38.5%)

Social network sites
(28%)

4

IT analyst firms
(18.6%)

Webinars (15.4%)

IT pros within firm/ IT
pros outside firm (16%)



Conclusions on cloud segments' influence mix

Mass marketing is dead as influence channels are more fragmented than ever, so vendors must leverage mix



Common element that feeds all influence channels = **high value content**



High value content teaches, sparks & nurtures conversation



Personas make a difference- use different tactics for different personas



High value content

Root of enterprise cloud solutions marketing

- Know your target segments and personas, to include current customers.
- Define high value content topics with broad appeal and rely on programs and communications mix (e.g., white papers, webinars, sales training, etc.) to target message.
- Use value models, calculators, research, and innovative formats to prove your value and not just proclaim it.
- Never forget the intent: get people talking to spark public relations articles and word of mouth among IT professionals, and only content that is high value achieves this aim.

Either write something worth reading or do something worth writing.

- Ben Franklin



Build plans and programs

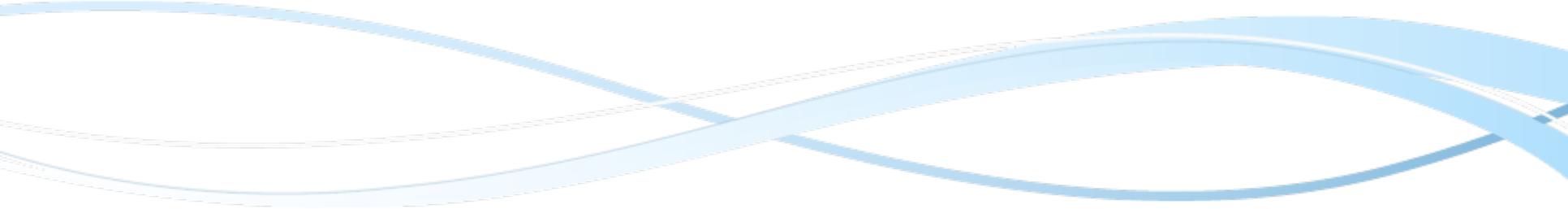
Better to leverage limited marketing resources

- Strong web sites and customer programs are non-negotiable and worth every penny.
- Nix smaller trade press until you've hit the biggest like *Information Week* and *CIO*.
- Join ecosystems, create strong partnerships and market through other vendors, particularly if you're small.
- It's Gartner first, if you can afford IT analysts.
- Low-cost social networking, especially LinkedIn, has undeniably growing influence.
- Meetups and camps are economical trade show and conference replacements, so make employees of all levels your ambassadors and encourage participation.

***Tell me and I forget.
Teach me and I
remember. Involve
me and I learn.***

- Ben Franklin





Thank You

WaveLength Market Analytics LLC www.wlanalytics.com

Appendix

Goals and Methods

- Goal: Understand broad enterprise migration-to-the cloud trends and the channel to customer
- Random sample drawn from Winn Enterprise/mid Market DB that included high-level IT decision-makers (Senior Managers, Directors, and VPs)
- Primary research data collection methodology collected by Winn Q2/Q3 2012 by using a telephone survey, supplemented by e-survey, landing page provided to provide respondents the ability to answer via Web, and incentives to increase response rates
- Sample size = 96; weighted to present distribution of US companies greater than 500 employees
- Using only SaaS alone not considered a cloud user or planner; they had to use another cloud service model and must actually have IT staff working on it