Digital Transformation

Sumeet Jain - November 2015
“By 2017 the CMO will spend more on IT than the CIO.”

Laura McLellan, Gartner
(January 2012)
MarTech Spend Will Grow 10x in 10 years to $120B

($ in billions)

Tech Spend as Percentage of Total Marketing Spend

Source: IDC, Magna Global
**MarTech Exits are Significant and Growing**

More than 50 exits > $200 million in the past 4 years

<table>
<thead>
<tr>
<th>2010</th>
<th>2011</th>
<th>2012</th>
<th>2013</th>
<th>2014</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>Google → invitmedia</td>
<td>Google → Admeld</td>
<td>Adobe → EfficientFrontier</td>
<td>salesforce → mopub</td>
<td>NEX AGE</td>
<td>Aol. → Verizon</td>
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<tr>
<td>Adobe → Day</td>
<td>Adobe → Demdex</td>
<td>ADobe → BUDDY MEDIA</td>
<td>SAP → hybris</td>
<td>Facebook → LiveRail</td>
<td>TellApart</td>
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<tr>
<td>Google → Wildfish</td>
<td>neustar → ak</td>
<td>AllianceData → CONVERSANT</td>
<td>NETSUITE → Bronica</td>
<td>appnexus → yieldex</td>
<td>Chango</td>
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<tr>
<td>salesforce → vitrue</td>
<td>Oracle → ExactTarget</td>
<td>YAHOO! → BrightRoll</td>
<td>rubicon → datalogix</td>
<td>Yieldex → Chango</td>
<td>Exelate</td>
</tr>
<tr>
<td>Oracle → responsys</td>
<td>Oracle → Bluekai</td>
<td>Google → AdapTV</td>
<td>Oracle → Converso</td>
<td>MAXPOINT</td>
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Consumers Driving New Behavior

Past

Present
Fundamental Shift in Marketing Organization

From Mad Men…

…to Math Men

Migration From A “Gut Feel” Exercise to an Iterative, Data-Driven Process
Picking Winners is Getting Harder and Harder...
Invest in Best of Breed Products for the Digital Marketer

- Search Engine Optimization Software
- Social Media Management Platform
- Video Management
- Promoted Listing
- Social Login / Sharing
- Loyalty Management
- Data Management Platform
- Mobile Marketing
The Marketer is a New and Different Buyer

Brands
- Coca-Cola
- Nike
- Samsung

Ecosystem
- Google
- Twitter
- Facebook

Technology
- Marketo
- Sprinklr

BrightEdge