

# Helping Enterprises Drive Competitiveness and Digital Transformation

Mathew Stava  
CEO, Spinnaker Support

# Matt Stava, Co-Founder & CEO



Matt Stava is a 24 year veteran technology executive who has been leading Spinnaker Support since inception in 2008. Under his leadership, the company has experienced double-digit growth through service line and geographic expansion, now operating globally in nine sales and operations centers.

Mr. Stava founded Spinnaker Support to provide organizations that run Oracle and SAP enterprise software an alternative to vendor-provided support. His mission was and remains today to simply deliver exceptional customer-service at significantly less cost. Through innovative and certified processes, employing the best people, and always respecting the vendor's intellectual property, Spinnaker Support is a leading influencer in the third-party support market.

Matt Stava began his career at Andersen Consulting, now Accenture, where he helped clients architect and restructure their supply chains. He then joined Solutions Consulting, subsequently acquired by Perot Systems, to launch and lead their supply chain practice. In 2002, he co-founded Spinnaker Management Group, which began as a supply chain consulting business but has grown and evolved into a holding company with several different companies.

Mr. Stava lives in Colorado and enjoys family time, golfing, and skiing. He is currently involved in several local charities including 10 years as a Board Member and Trustee of the Denver Area Council of Boy Scouts. He received his Bachelor of Science degree in Business Administration and Finance from University of Kansas.

# Agenda Overview



# State of the South Korean Market



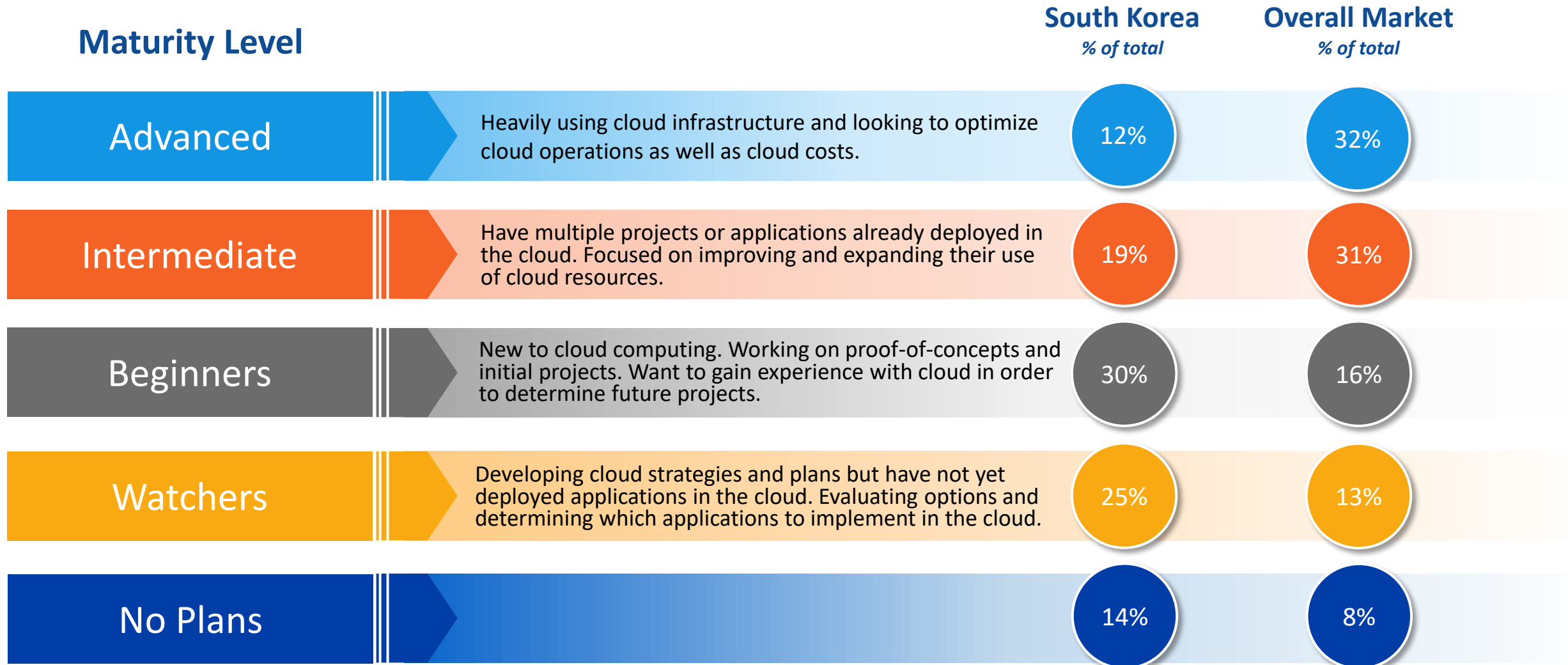
## Top CEO Business Objectives:

1. Growth and increased market share
2. Innovation through R&D
3. Globalization and geographic expansion
4. Profit improvement
5. Digital transformation

## CIO Agenda:

- Innovate faster:
  - Need to free up funding for cloud solutions, BI and analytics, AI and machine learning, ERP
  - Re-tool staff to drive digital business objectives
- Move from “designing digitalization” to “delivering digitalization”
  - 69% of organizations have no digital initiative, are desiring digitalization, or designing digitalization.

# Cloud Maturity of the Market



# Differing Business Objectives than Top Performers

Top Business Objectives	Top Global Performers	South Korean Enterprises
Digital transformation	1	5
Growth/market share	2	1
Profit improvement	3	4
Technology initiatives	4	7
Customer focus	5	10

*2018 CIO Agenda: A South Korean Perspective, Gartner*

- Top global performers focusing on different business objectives
- 90% of IT budget spent on ongoing operations and enhancement of existing systems; leaves just 10% for innovation
  - Excessive portion of IT investment allocated to maintenance fees for on-premise legacy enterprise applications
  - Current staff tooled for tactical work, not prepared to drive digital transformation
  - Unable to develop agile technology strategy while locked into their enterprise software vendors' roadmaps

# Must Shift Funding to Drive Innovation

Top Technology Investment Areas	South Korean Enterprises	Top Global Performers
BI/analytics	1	2
Cloud services	2	3
Artificial intelligence	3	4
ERP	4	Not in top 10
MES	5	Not in top 10
Infrastructure/data centers	6	8
Cyber/info security	7	6
Digitalization	8	1
Internet of Things	9	7
Technology integration	10	Not in top 10

- Top performers heavily investing in digitalization
- Top performers have cut investments in on-premise ERP software and manufacturing execution systems (MES)
- South Korean enterprises can free up funding for innovation by reducing spend on ERP software and support

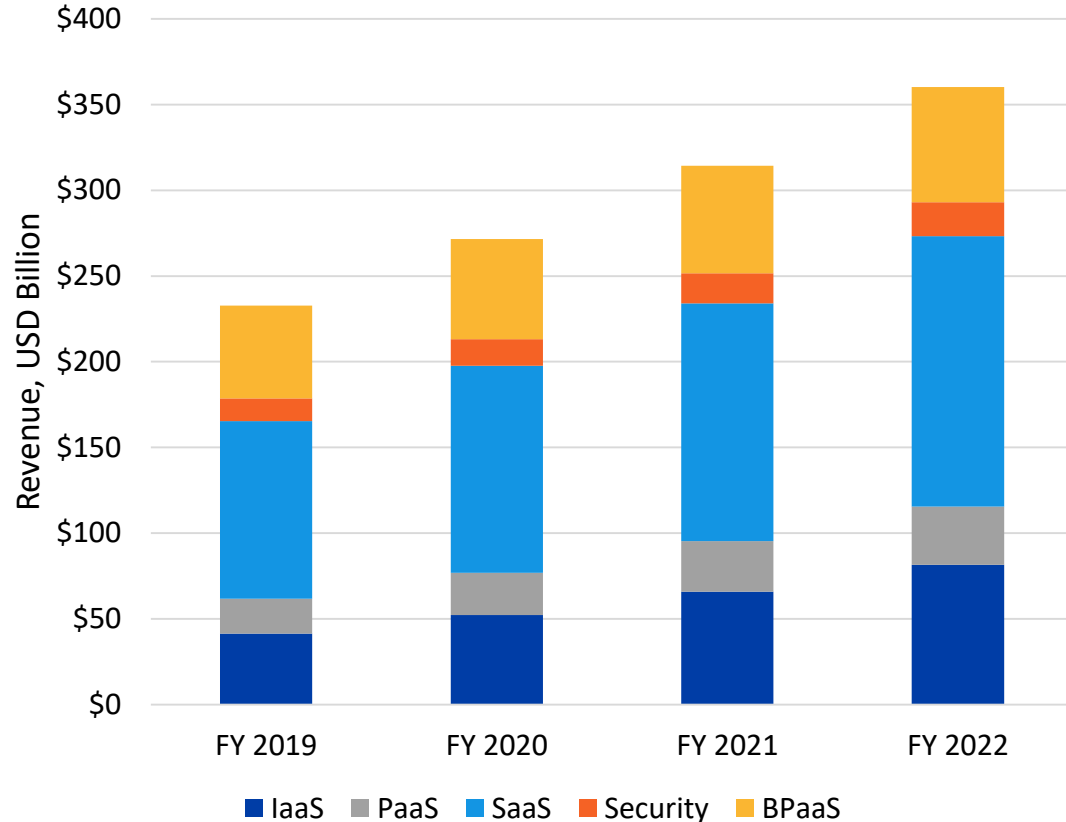


# Driving Competitiveness through Digital Transformation



# Cloud Services on the Rise

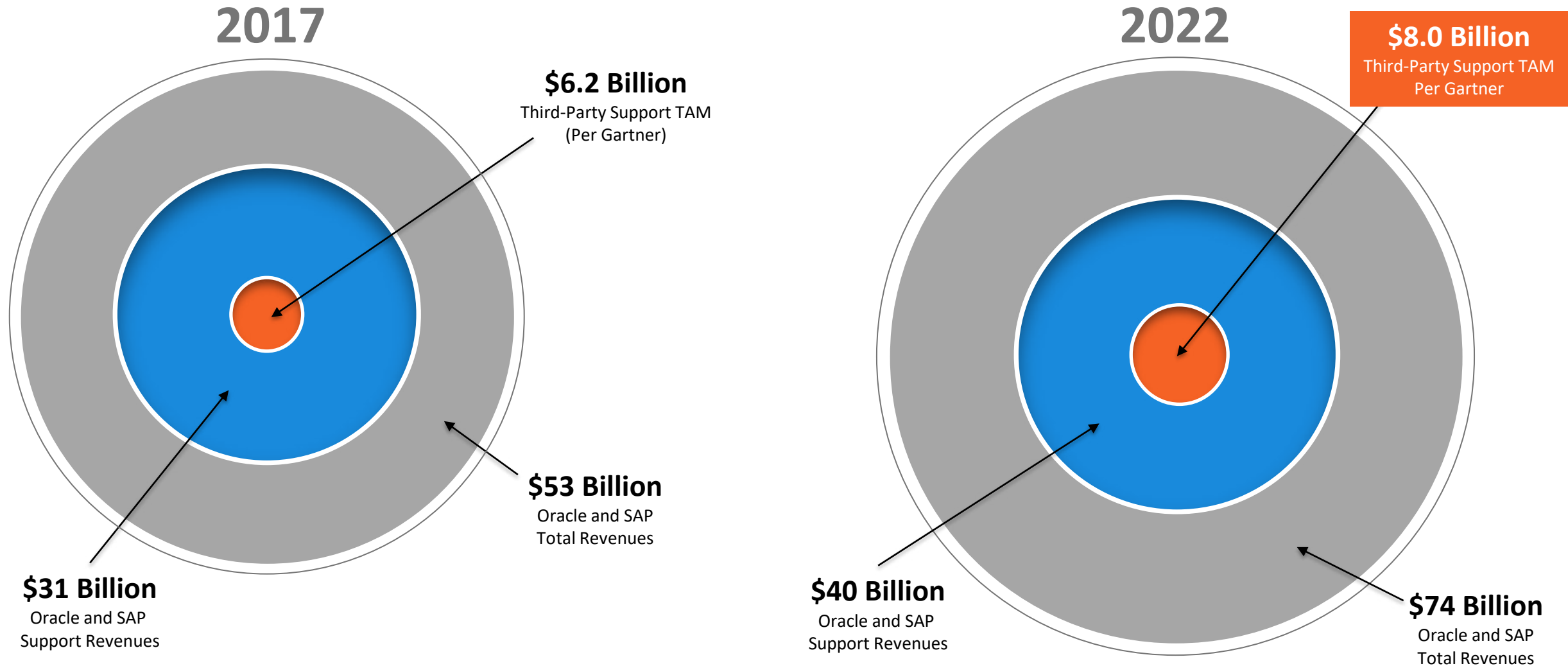
## Public Cloud Services Market



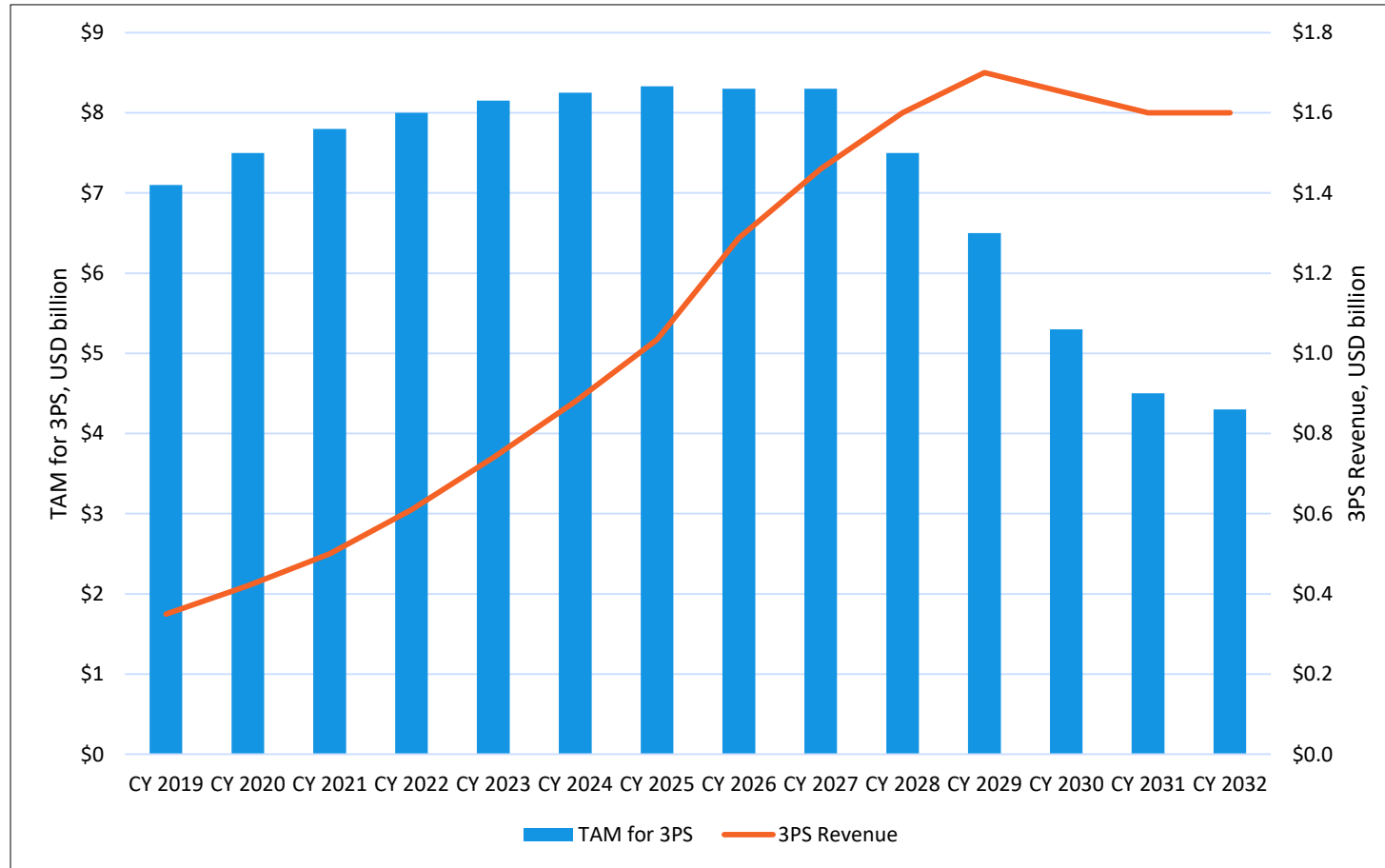
- Cloud computing is fundamental to any digital transformation strategy.
- Top performers are embracing cloud services and migrating more and more applications to public cloud providers.
- However, adopting cloud services at scale requires additional investments, not only in technology, but also in new skills, processes and tools.

Forecast Analysis: Worldwide Public Cloud Services, Feb. 8, 2019, Gartner

# \$8 Billion Target Addressable Market by 2022



# 3PS is Helping Accelerate Digital Transformation



## Third-Party Oracle & SAP Support Will Be Required for Decades

- Users will continue to upgrade and expand their on-premise applications

# About Spinnaker Support and Where We Fit



# Why Companies Switch



MIGRATING



FINANCIAL RELIEF



SUSTAIN & TRANSFORM

## ORACLE & SAP ANNUAL SOFTWARE SUPPORT



Break/Fix



Tax and Regulatory



General Inquiry

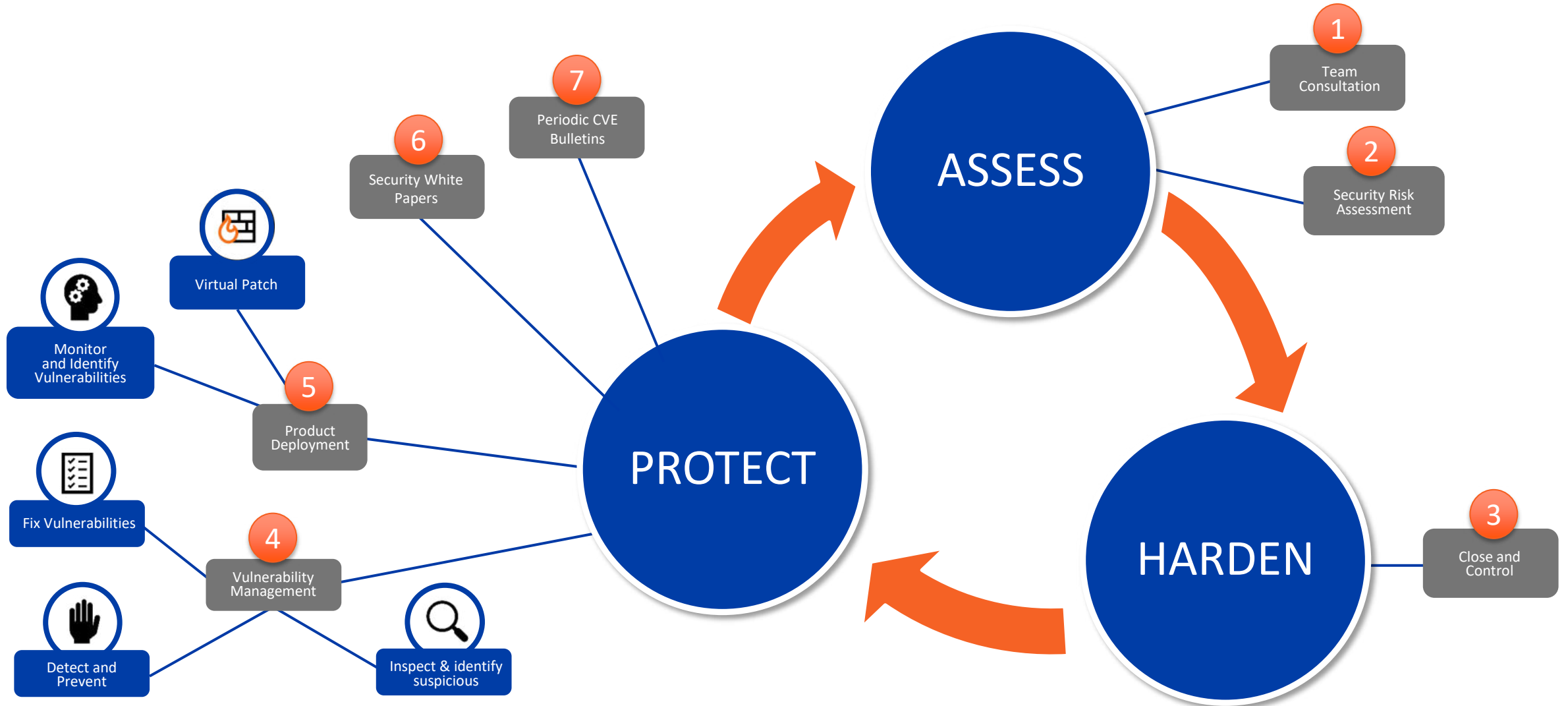


Security &  
Vulnerability Mgmt.



Technology  
Services

# Seven-Point Security Solution





# The Smart Choice



**24x7x365**  
Global coverage  
from 9 regional  
op centers

**1,078+**  
Number  
of customers

**98.7%**  
Customer  
Satisfaction

**104/14**  
Countries /  
Languages  
Supported

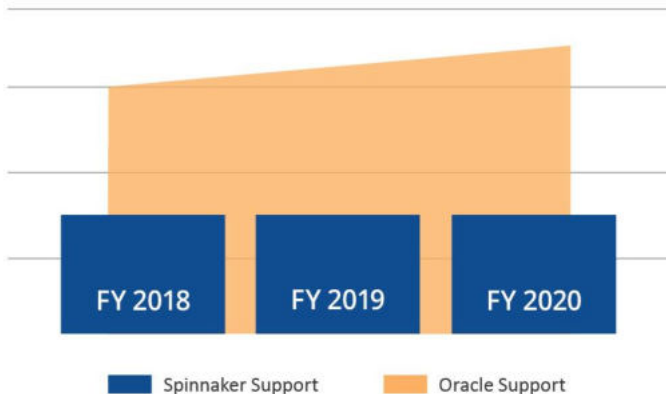
- ✓ Service Quality
- ✓ Speed of Response  
Functional &
- ✓ Technical Knowledge
- ✓ Follow-up to Drive  
Issue Resolution

# Customer Case Study - Millicom



**\$9.6 MILLION SAVED IN 3 YEARS**

Excludes savings gained by avoiding forced upgrades  
or liberating internal FTEs



## About Millicom:

An international telecommunications and media company that offers a wide range of digital services to more than 51 million customers in 11 African and Latin American markets.

## Millicom's Business Challenge:

Undergoing a transformation from digital products to digital customer journeys - with a renewed focus on customer lifetime value. Their operational objectives include the monetization of data, convergence from mobile-only to state-of-the-art digital, and provide high-speed data networks in Latin America. Millicom needed to improve deteriorating margins, cover dividends, and create a positive eFCF - and to accelerate digital transformation.

## Millicom's Technical Challenge:

Grew dissatisfied with expensive, inflexible Oracle-provided support and the finger pointing between Oracle and the managed services provider hired to resolve level 2 and 3 software/technology stack issues.

## Millicom's Winning Business Case:

Millicom continues to progress through its strategic digital transformation. The savings and better service afforded by Spinnaker Support are helping advance the business case while eliminating a major technical concern.

# Customers with Operations in South Korea



Abbott



ManpowerGroup



# Customers headquartered in South Korea

Coréana



POSCO

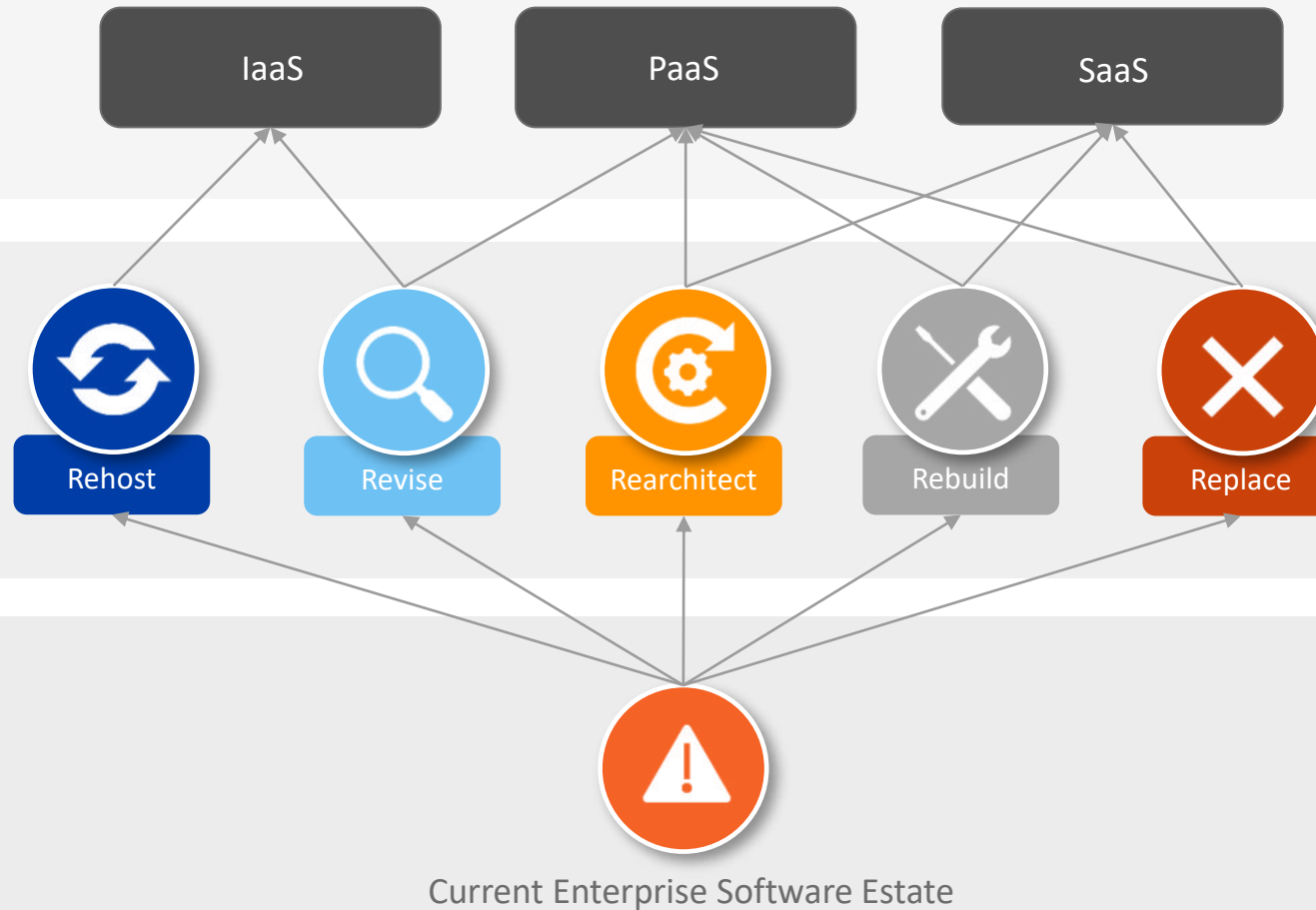


# How Spinnaker Support Drives Cloud Migration

FUTURE STATE

STRATEGY

CURRENT STATE



## Spinnaker Support Enables:

1. Time – To fund cloud and not get locked into Oracle or SAP cloud solutions.
2. Savings - Immediate hard cash savings to more quickly fund strategic cloud migration.
3. Flexibility – Commercial terms that adapt services and fees as one moves from current state to desired state.
4. Staff Evolution – We provide the software support skills you require today while you re-tool your internal support staff for tomorrow.
5. Actual Cloud Migration - Lift and Shift services to move on-premise applications to public cloud and then managed services for those apps that sit in the cloud.