Welcome Back

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CLOUD IS A C-SUITE INVESTMENT

	INFLUENCE		
	ENTERPRISE		**SMB**

Role	Significant Influence	Some Influence	No Influence	Don't Know	Enterprise Rank	Enterprise %	SMB Rank	SMB %
CIO or Top IT Executive	72%	15%	7%	5%	1	93%	1	82%
CTO	54%	18%	13%	15%	4	82%		62%
CEO	46%	34%	13%	7%		77%	2	72%
CSO/CISO or Head of IT Security	42%	34%	13%	11%	2	87%	5	66%
IT Architect	39%	38%	15%	9%	2	87%	4	67%
CFO	35%	39%	18%	8%		77%	2	72%
IT/Networking Management	34%	37%	16%	12%	5	81%		63%
COO	27%	35%	23%	15%		67%		57%
Chief Digital Officer	23%	25%	27%	24%		58%		39%
Engineer	17%	41%	27%	14%		69%		50%
System Integrator	15%	37%	32%	16%		58%		46%
Application/Software Developer	14%	36%	36%	14%		57%		43%
Line of Business Management	13%	40%	33%	13%		63%		45%
Chief Marketing Officer	11%	30%	40%	19%		47%		36%
Other IT/Networking Staff	10%	37%	33%	20%		52%		43%
BRM	7%	29%	43%	21%		44%		29%
Human Resources	6%	24%	55%	15%		37%		24%

Callouts: 87%, 80%, 76%, 77%

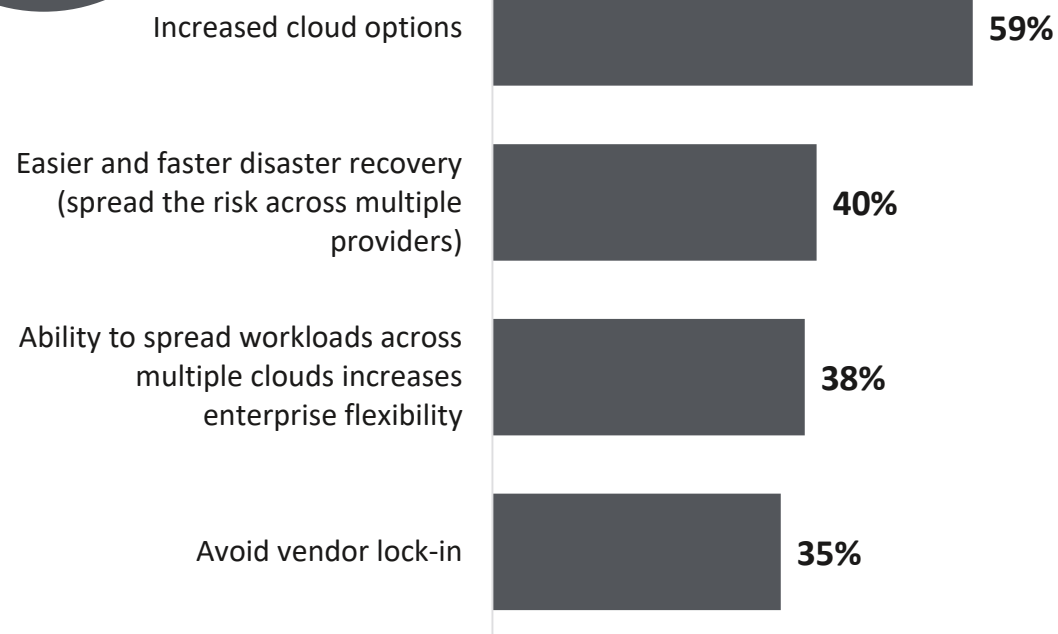Legend: ■ Significant Influence ■ Some Influence ■ No Influence ■ Don't Know

Q. How influential are the following groups/individuals during the cloud computing purchase process?
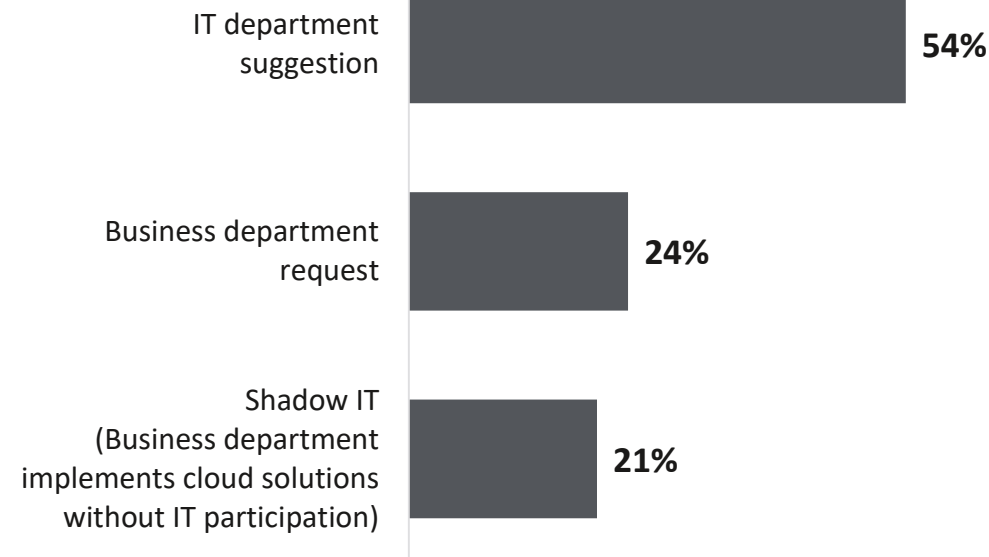
Source: 2018 IDG Cloud Computing Survey

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IT IS DRIVING MULTI CLOUD IMPLEMENTATION

42% are utilizing multi cloud

Benefits of Multi Cloud

Benefit	Percentage
Increased cloud options	59%
Easier and faster disaster recovery (spread the risk across multiple providers)	40%
Ability to spread workloads across multiple clouds increases enterprise flexibility	38%
Avoid vendor lock-in	35%

How Multi Cloud Evolved

Method	Percentage
IT department suggestion	54%
Business department request	24%
Shadow IT (Business department implements cloud solutions without IT participation)	21%

Q. When thinking about your organization's cloud strategy, does your organization currently utilize hybrid cloud, multi cloud structure or both? AND Q. When thinking about your organization's cloud strategy, does your organization currently utilize hybrid cloud, multi cloud structure or both? AND Q. How has multi cloud evolved or been implemented into your cloud strategy?

Source: 2018 IDG Cloud Computing Survey

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IT IS THINKING ABOUT CLOUD WITH PORTFOLIO MANAGEMENT

49% No

51% Yes
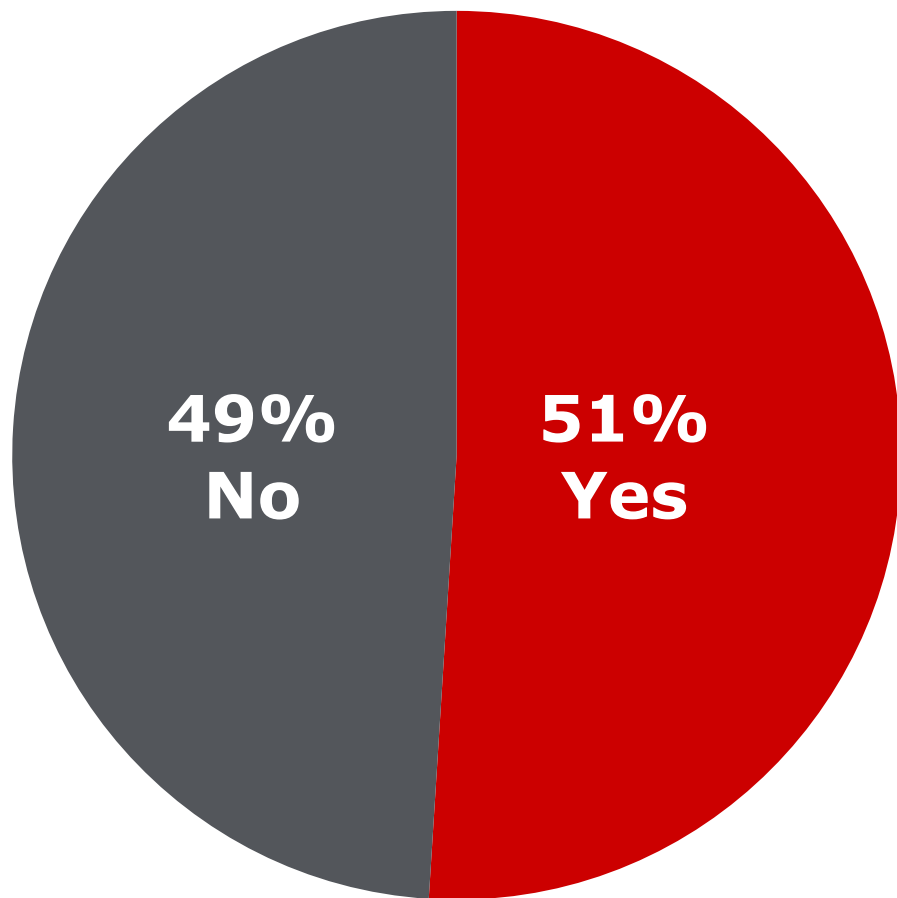
	YES	NO
Financial Services	63%	37%
High Tech	63%	38%
Healthcare	54%	46%
Services	54%	46%
Telecomm/ Utilities	48%	52%
Government/Non Profit	46%	54%
Manufacturing	43%	57%
Education	41%	59%

Q. Are you beginning to think of cloud providers as a portfolio?

Source: 2018 IDG Cloud Computing Survey

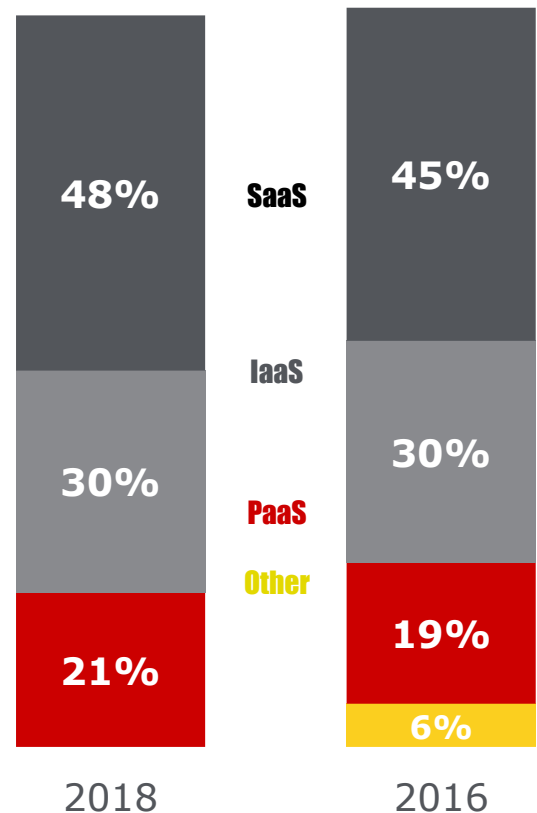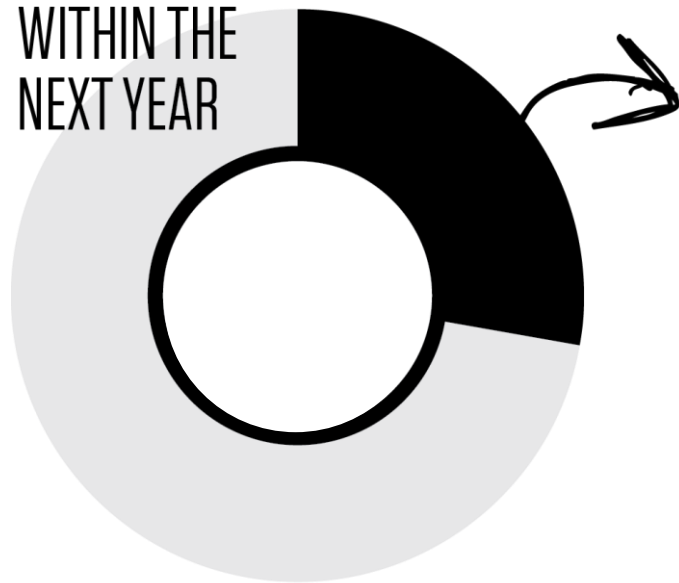CDW | EXECUTIVE SUMMIT SERIES

CLOUD HAS COME OF AGE
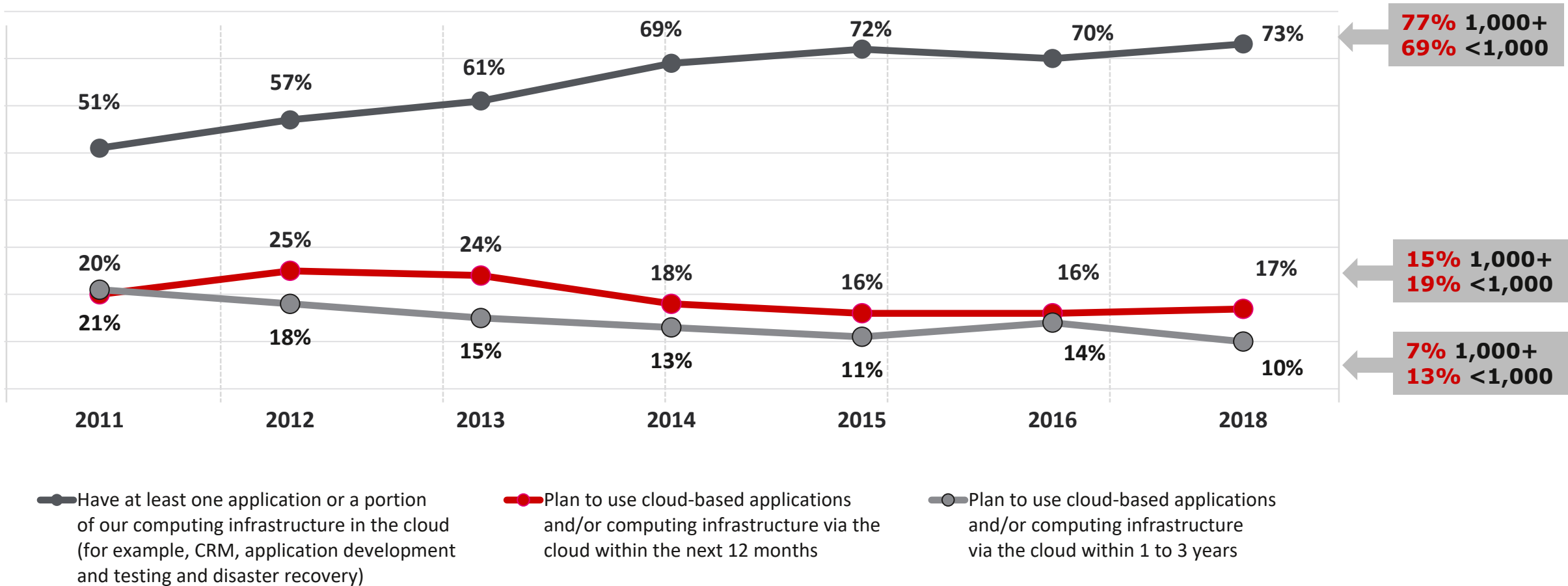
Q. What are your organization's plans with regard to utilizing computing infrastructure or applications via the cloud?

Source: 2011 - 2018 IDG Cloud Computing Survey

CLOUD BUDGETS CONTINUE TO GROW

TOTAL **IT BUDGET** ALLOCATED TO **CLOUD COMPUTING** WITHIN THE NEXT YEAR

	2018	2016
SaaS	48%	45%
IaaS	30%	30%
PaaS	21%	19%
Other		6%

AVERAGE INVESTMENT

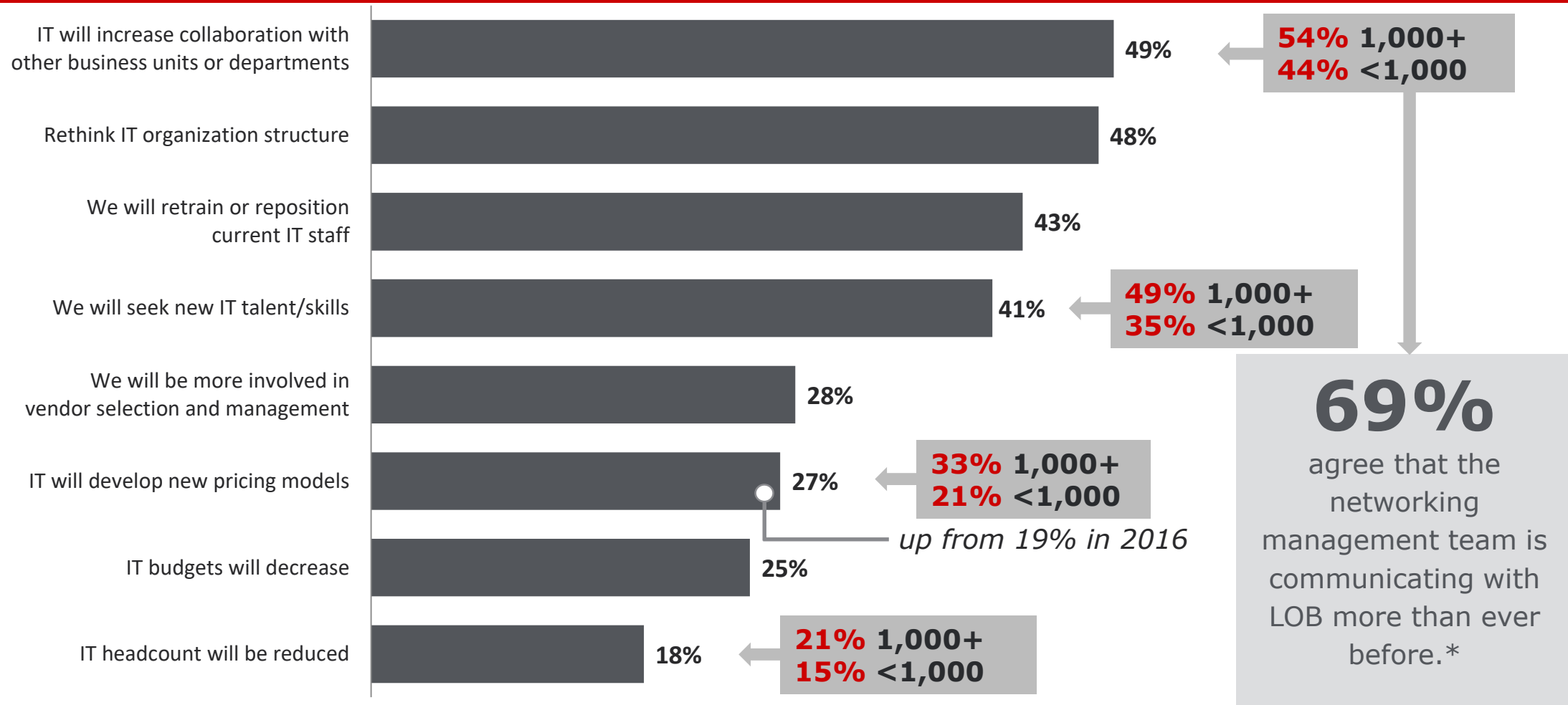**$2.2M** *Up from $1.62M in 2016*

1,000+ $3.5M

<1,000 $889K *Up from $286K in 2016*

Q. What percent of the total IT budget your organization is dedicating to cloud computing will be allocated to each of the following cloud service models over the next 12 months? AND Q. Approximately how much will your organization invest in cloud-based services computing (including software, services, training and other related costs) in the next 12 months?

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CLOUD INITIATIVES REQUIRE COLLABORATION, RESTRUCTURING AND RETRAINING

IT will increase collaboration with other business units or departments — 49%
54% 1,000+
44% <1,000

Rethink IT organization structure — 48%

We will retrain or reposition current IT staff — 43%

We will seek new IT talent/skills — 41%
49% 1,000+
35% <1,000

We will be more involved in vendor selection and management — 28%

IT will develop new pricing models — 27%
33% 1,000+
21% <1,000
up from 19% in 2016

IT budgets will decrease — 25%

IT headcount will be reduced — 18%
21% 1,000+
15% <1,000

69%
agree that the networking management team is communicating with LOB more than ever before.*
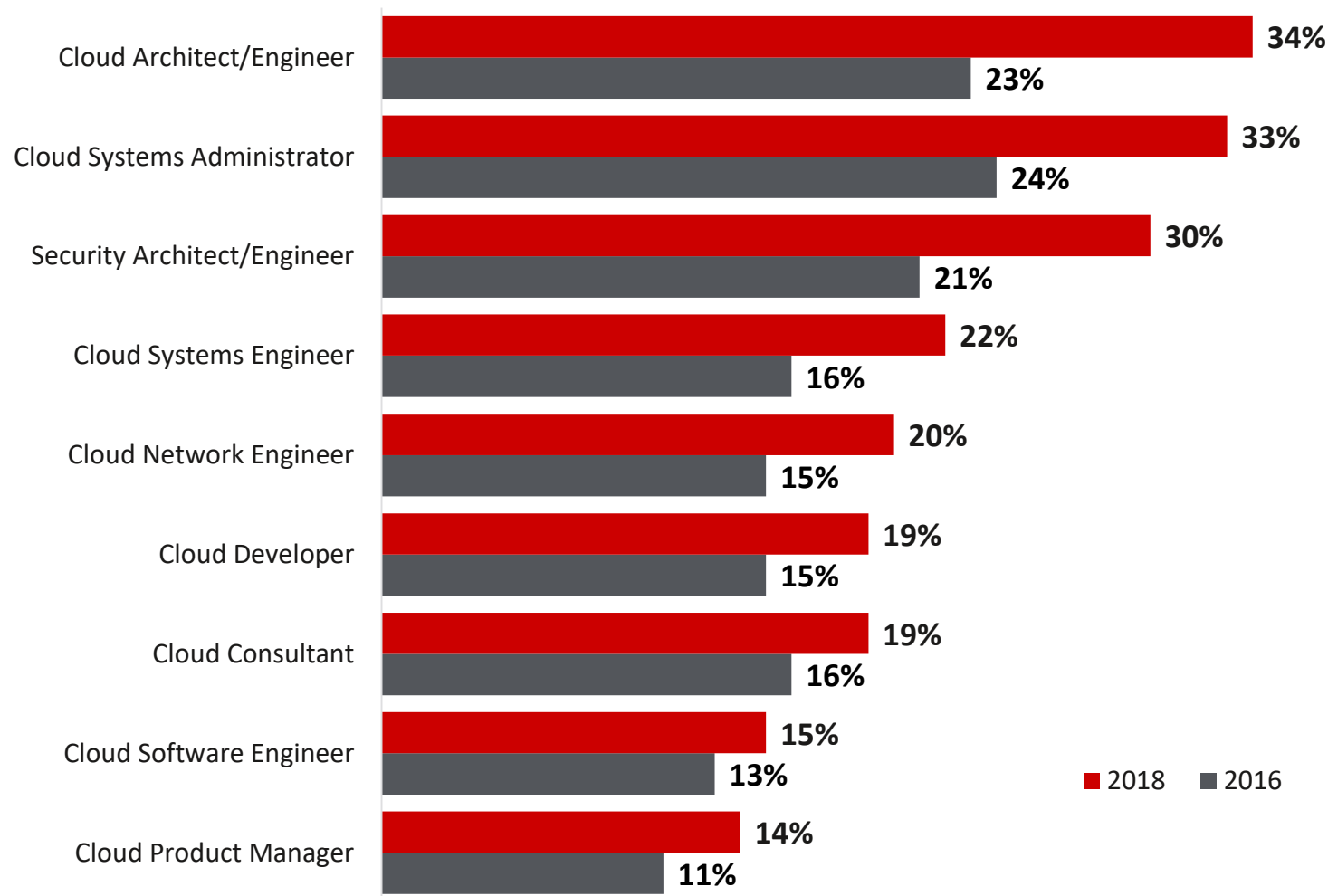
Q: In which of the following ways will cloud computing impact your organization's IT function over the next 12 months?

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INVESTING IN PEOPLE IS IMPORTANT TO CLOUD SUCCESS

Cloud Architect/Engineer
- 34% (2018)
- 23% (2016)

Cloud Systems Administrator
- 33% (2018)
- 24% (2016)

Security Architect/Engineer
- 30% (2018)
- 21% (2016)

Cloud Systems Engineer
- 22% (2018)
- 16% (2016)

Cloud Network Engineer
- 20% (2018)
- 15% (2016)

Cloud Developer
- 19% (2018)
- 15% (2016)

Cloud Consultant
- 19% (2018)
- 16% (2016)

Cloud Software Engineer
- 15% (2018)
- 13% (2016)

Cloud Product Manager
- 14% (2018)
- 11% (2016)

■ 2018 ■ 2016

WILL SEEK NEW IT TALENT OR SKILLS
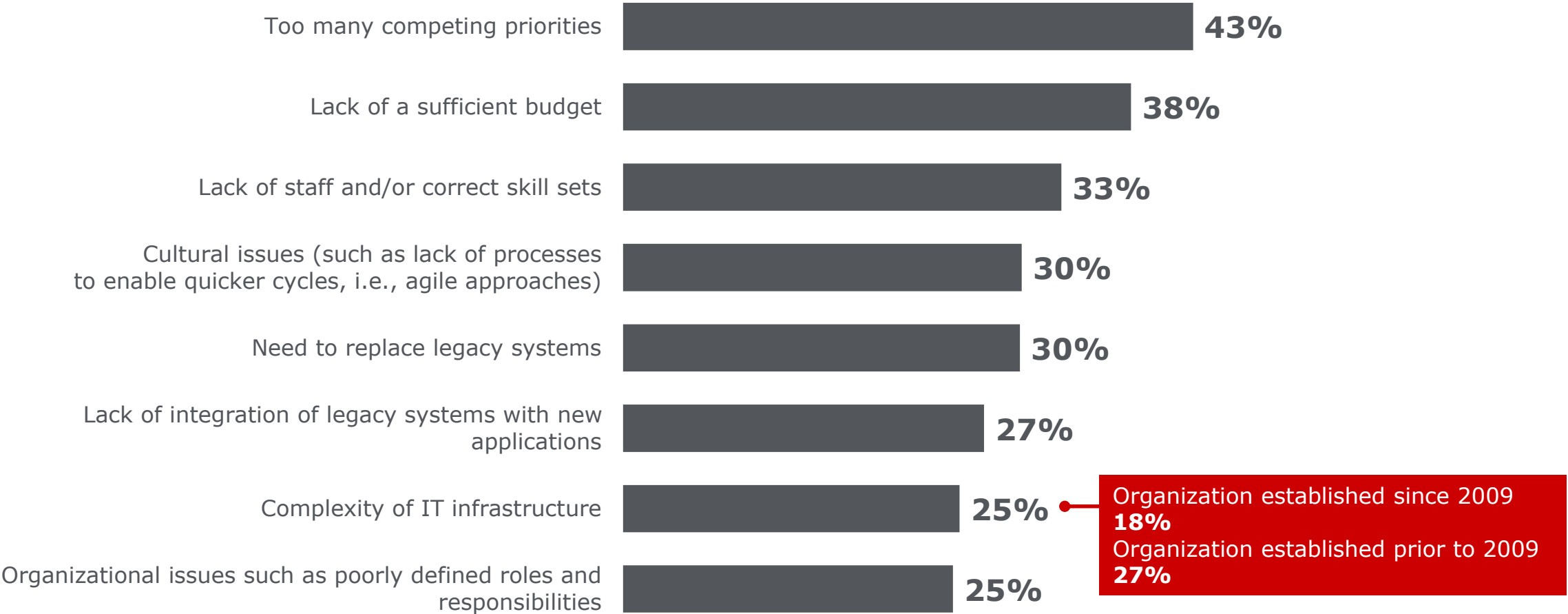
1,000+
49%
up from 38% in 2016

<1,000
35%
up from 31% in 2016

Organizations adding **3** new roles/functions

Q. What new roles and functions have been added at your organization as a result of your cloud investments?

Source: 2016-2018 IDG Cloud Computing Survey

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CHALLENGES TO ACHIEVING DIGITAL TRANSFORMATION SUCCESS

Challenge	Percentage
Too many competing priorities	43%
Lack of a sufficient budget	38%
Lack of staff and/or correct skill sets	33%
Cultural issues (such as lack of processes to enable quicker cycles, i.e., agile approaches)	30%
Need to replace legacy systems	30%
Lack of integration of legacy systems with new applications	27%
Complexity of IT infrastructure	25%
Organizational issues such as poorly defined roles and responsibilities	25%

Organization established since 2009
18%
Organization established prior to 2009
27%

Q. What are the biggest challenges your organization faces in achieving success with digital business initiatives?

Source: IDG Digital Business Study, 2019

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NEW PRODUCTS AND THE ABILITY TO INNOVATE LEAD TO INCREASED REVENUE

	50%	1,000+	<1,000
New product and service offerings	50%	57%	44%
Improved ability to innovate and seize new opportunities	49%	49%	50%
New capabilities	42%	47%	38%
Improved sales capacity (ability to cross-sell, upsell)	41%	35%	44%
New partnerships	34%	35%	31%
Improved ability to integrate and analyze company, customer, and external data	31%	34%	29%
Employee efficiency which leads to faster product/service delivery	31%	30%	32%
Global or regional expansion	17%	22%	14%
M&A activity	12%	18%	8%
Other	6%	2%	10%

Q. If your company has experienced revenue growth, what do you consider to be the primary cause(s) of the increase?

Source: IDG Digital Business Study, 2019

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