


# Analyst Day

November 16, 2011

# Greg Secord, Vice President, Investor Relations



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# Disclaimer

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# Agenda

| | |
|---|---|
| **9:00AM EST** | **OpenText Product Strategy and Roadmap** |
| **11:00AM EST** | **Choose from available conference breakout sessions** |
| **12:00PM EST** | **OpenText Go-to-Market and Sales Management Strategy** |
| **1:30PM EST** | **Keynote Presentation** |
| **3:20PM EST**<br>**4:10PM EST**<br>**4:40PM EST** | **Choose from available conference breakout sessions** |
| **6:00PM EST** | **Cocktails and dinner at Norman's (Ritz-Carlton)** |

# OpenText Product Strategy Update

- Tom Jenkins, Executive Chairman and Chief Strategy Officer
- Richard Anstey, Chief Architect
- Eugene Roman, Chief Technology Officer
- Adam Howatson, Senior Director, Product Management

# Tom Jenkins, Executive Chairman and Chief Strategy Officer



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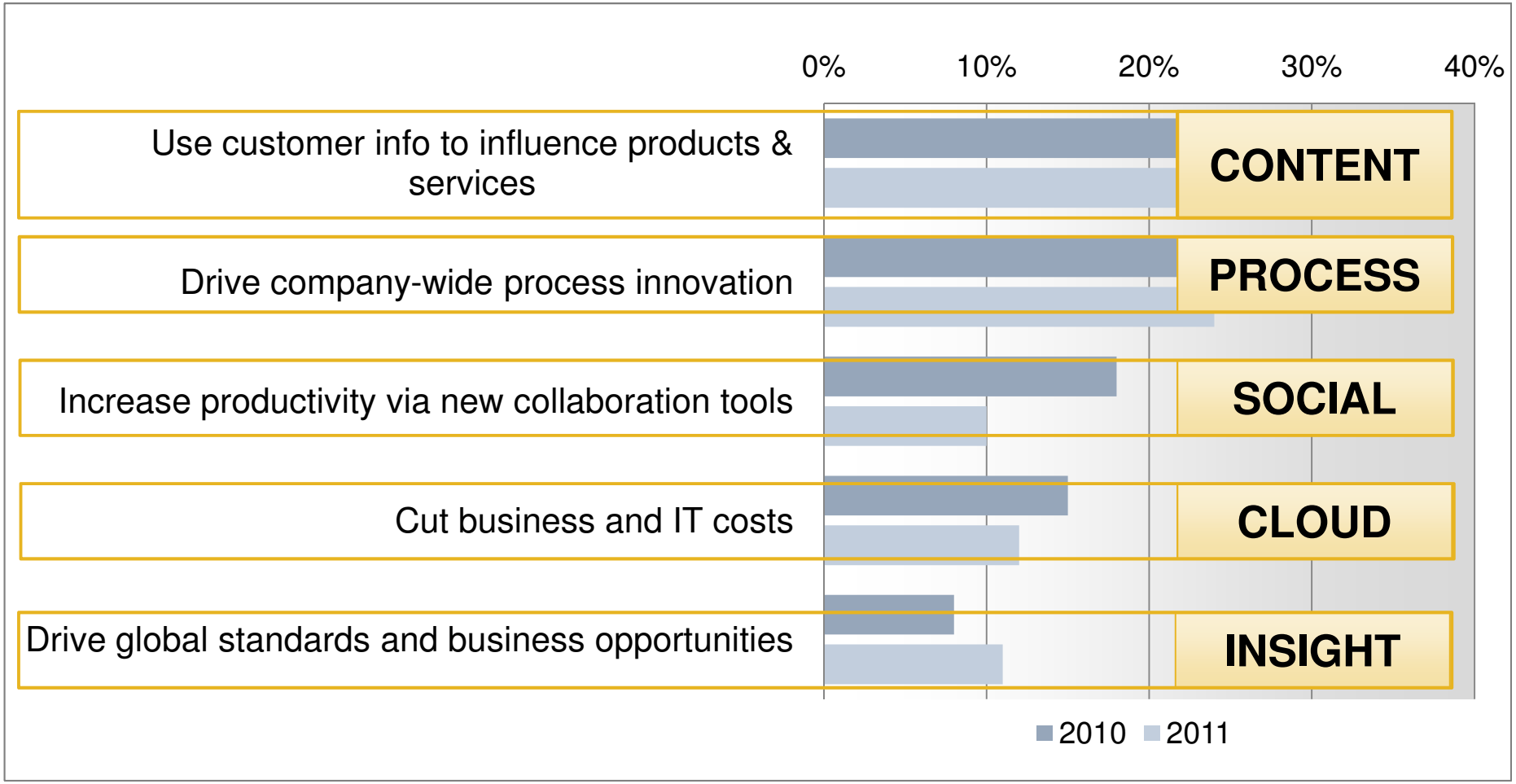
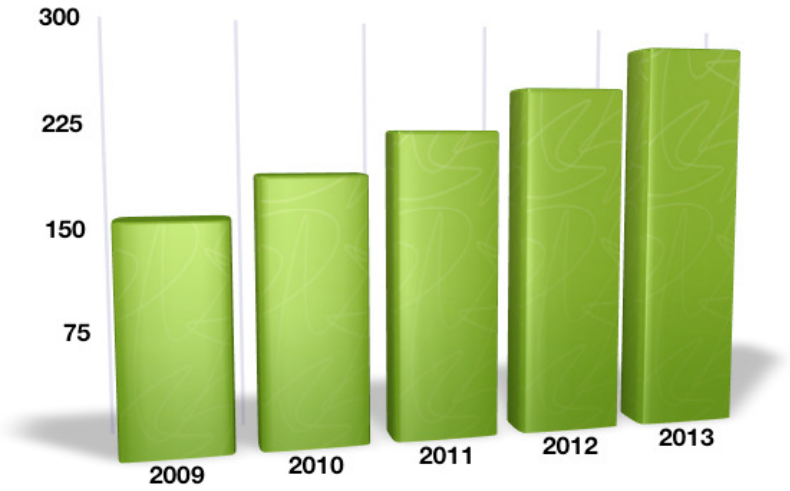
# Our Priorities Match Your Priorities




**Source:** InformationWeek Global CIO Survey, 2010 & 2011

# Investing $Billions into Enterprise Applications

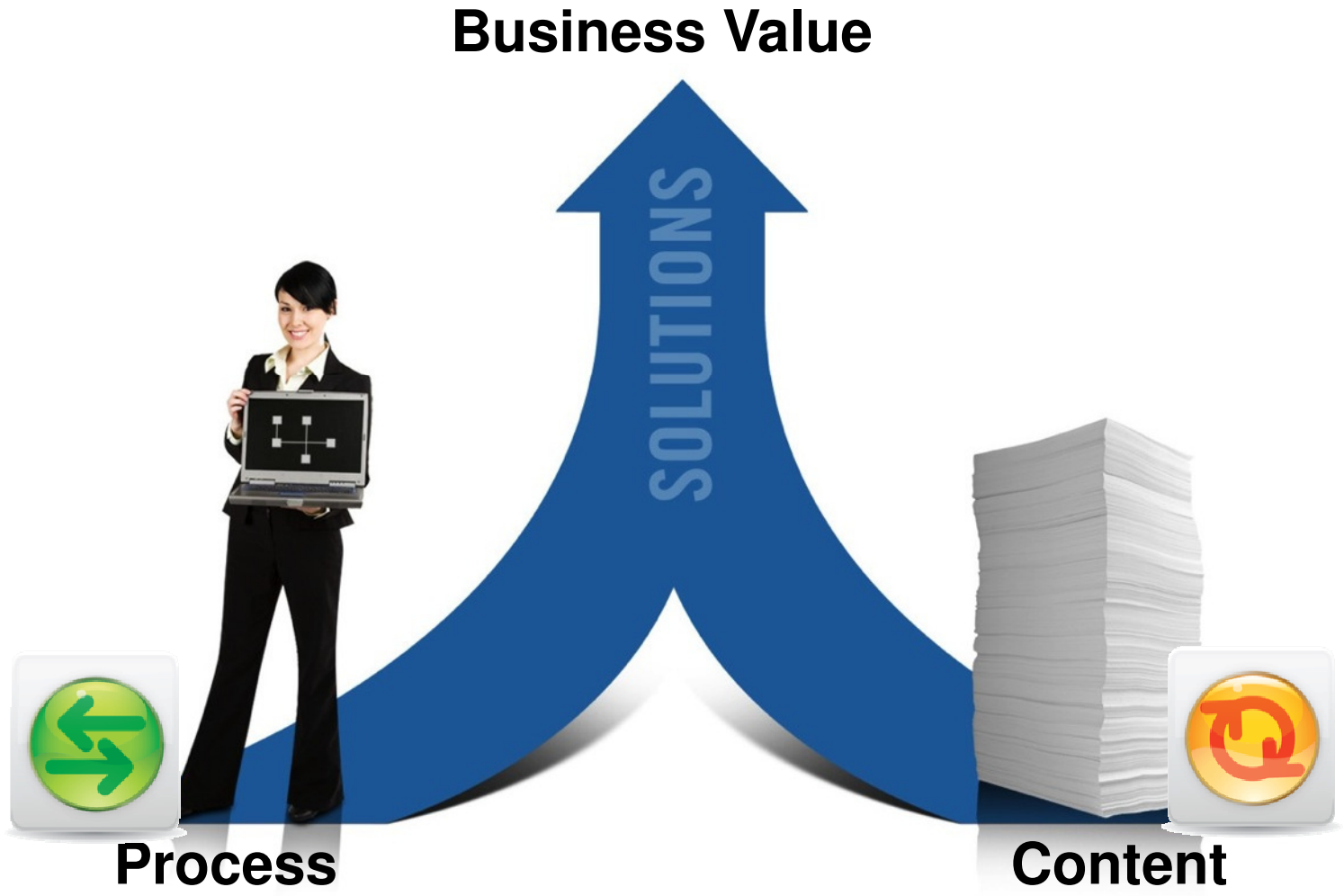



R&D Investment



Strategic Additions

# Bringing Process and Content Together



# Process

Global360 + METASTORM =

OPENTEXT
Business Process Solutions



# Accelerate Deployments with Learning

operitel corporation

| | |
|---|---|
| Message Centre | Achievement Records |
| Course Catalogue | User Profiles |
| Registration | Instant Messaging |
| Competency Management | Marquee Banner |
| Live Text Discussion | Surveys |
| Notebook | Reference Library |
| Quick Polling | Customizable Links |
| Discussion Forum | Reports |
| Competency Tracking | Certificates |
| E-Commerce | Matrix-based security |
| E-Business | Advanced Search |
| Individual Learning Plans | E-Classroom |

*Deliver, track, and validate learning of applications*



# Microsoft Strategy

*Together **we** influence directions*



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Microsoft GOLD CERTIFIED Partner — Learning Solutions

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Microsoft Partner Network — 2011 PARTNER OF THE YEAR
ISV/Software Line of Business
Finalist

Microsoft GOLD CERTIFIED Partner — ISV/Software Solutions

Global 360

Microsoft Partner Network — 2011 PARTNER OF THE YEAR
ISV/Software Industry
Winner

Microsoft Partner Network — 2011 PARTNER OF THE YEAR
Visio
Winner

METASTORM

Microsoft GOLD CERTIFIED Partner — ISV/Software Solutions

# Powered by OpenText

- OpenText Web Experience Management
- OpenText Portal
- OpenText Social Communities



# Our Strategy



# Create Mobile Apps Once and Deliver on Multiple Mobile Platforms



Tablets and smartphones are driving new ways to use content



# The Consumerisation of IT



# Social, Process, Content in the Private Cloud








The Power to Create
The Freedom to Choose

# OpenText Enterprise App Store





innovate

# Enterprise APPLICATIONS

## Currently Installed

**Note Minder**
On-screen notes kept on your Personal Workspace

**IPSwitch**
Vitae id consequat mass euismod auctor tortor vehicula

**OnTime**
Basic calendaring and schedule management

**KeyPoint**
Presentation software to express all your brilliant ideas

## Recommendations

**ToolKit API**
Lorem dolor amet, adipiscing massa purus vitae.

**Dashboard KPI**
Find out what's going on that's important with this app.

**SuperSearch**
Extending the default search to include meta tags and more

**Lighthouse**
Lorem ipsum dolor sit amet, consectetur adipiscing elit.

**Countdown**
Duis vehicula tortor quis neque faucibus auctor.

**IdeaKeeper**
Duis vehicula tortor quis neque faucibus auctor.

**Banzai!**
Quisque massa purus euismod id consequat imperdiet vitae.

**Dispatch**
Secure document syncing over the cloud.

## 8 Tasks

## 3 Notifications

James Storm commented on the task Iteration Zero - Don't forget to digitally sign the document and forward it off to Pat before week's end! Getting excited to see this project started!
2 hours ago

Andrew Scoble created the milestone - Team List Submission
7 hours ago

Melanie Holmes created the task - Expense Submissions
2 days ago

## Pulse

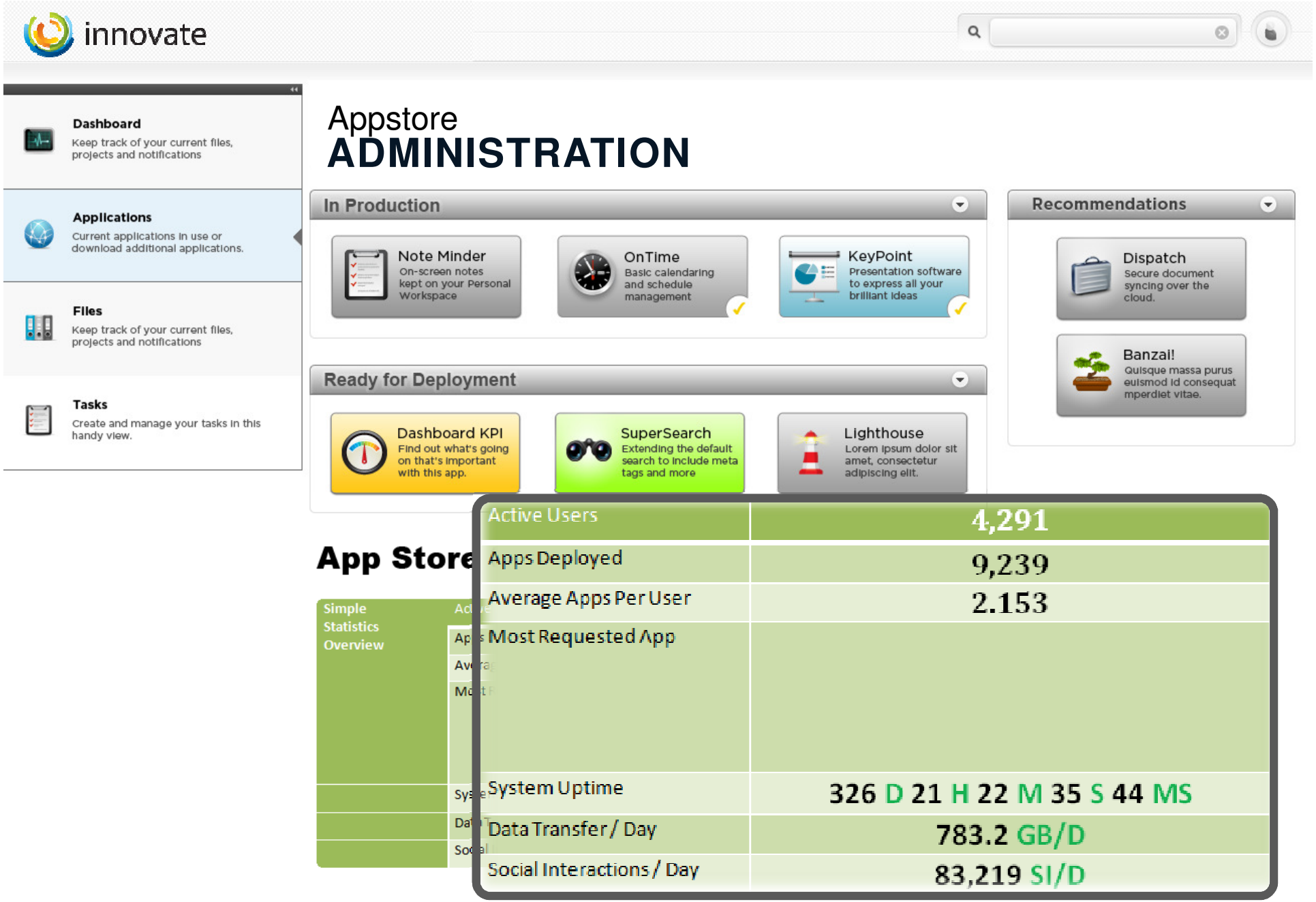
Currently debating the use of the Oxford comma in the office. Look what you started @grahamw!

Need advice/input - What are your opinions on sharing & over-sharing on Facebook? ow.ly/6OdqP

There are no organizations that are naturally innovative. It's a learned behavior - linkd.in/mPP4WE

For me the purpose of Pulse is to connect and build a relationship, which is most successful when we meet.

## Favorites


innovate
Dashboard
Keep track of your current files, projects and notifications
Applications
Current applications in use or download additional applications.
Files
Keep track of your current files, projects and notifications
Tasks
Create and manage your tasks in this handy view.
Appstore
ADMINISTRATION
In Production
Note Minder
On-screen notes kept on your Personal Workspace
OnTime
Basic calendaring and schedule management
KeyPoint
Presentation software to express all your brilliant ideas
Recommendations
Dispatch
Secure document syncing over the cloud.
Banzai!
Quisque massa purus euismod id consequat mperdiet vitae.
Ready for Deployment
Dashboard KPI
Find out what's going on that's important with this app.
SuperSearch
Extending the default search to include meta tags and more
Lighthouse
Lorem ipsum dolor sit amet, consectetur adipiscing elit.
App Store
Simple Statistics Overview
Active Users 4,291
Apps Deployed 9,239
Average Apps Per User 2.153
Most Requested App
System Uptime 326 D 21 H 22 M 35 S 44 MS
Data Transfer / Day 783.2 GB/D
Social Interactions / Day 83,219 SI/D

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ENTERPRISE APPSTORE

Apps by Industry

Energy

Apps by Solution

Apps by Use Case

Apps by Name

ECM SUITE

# Energy Industry APPS

### Well File Management

This App extends the ECM Suite Content Server capabilities to support the effective management of Energy Well related content on Smartphones, Tablets and Web Browsers.

Download Trial | Ratings & Reviews | Screenshots

### Mobile Incident Reporting

Mobile Incident Reporting can be purchased Directly through iTunes, Android Market and BlackBerry AppWorld. The mobile clients work with your existing ECM Suite BPM products to provide real time mobile incident reports with GEO-Tagging and live Video Archiving.

Download Trial | Ratings & Reviews | Screenshots

### SOP Companion

The Standard Operating Procedure Companion lets you send live updates of your procedures to field employees. By leveraging the integrated workflow and audit capabilities of the ECM Suite the SOP Companion ensures you have the ....

Download Trial | Ratings & Reviews | Screenshots

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ENTERPRISE APPSTORE

Apps by Industry

Energy

Apps by Solution

Apps by Use Case

Apps by Name

ECM SUITE

# Energy Industry APPS

## Well File Management

This App extends the ECM Suite Content Server capabilities to support the effective management of Energy Well related content on Smartphones, Tablets and Web Browsers.

Number of Users

200

Add to Cart

Download Trial | Ratings & Reviews | Screenshots

# Mobilized Business Apps

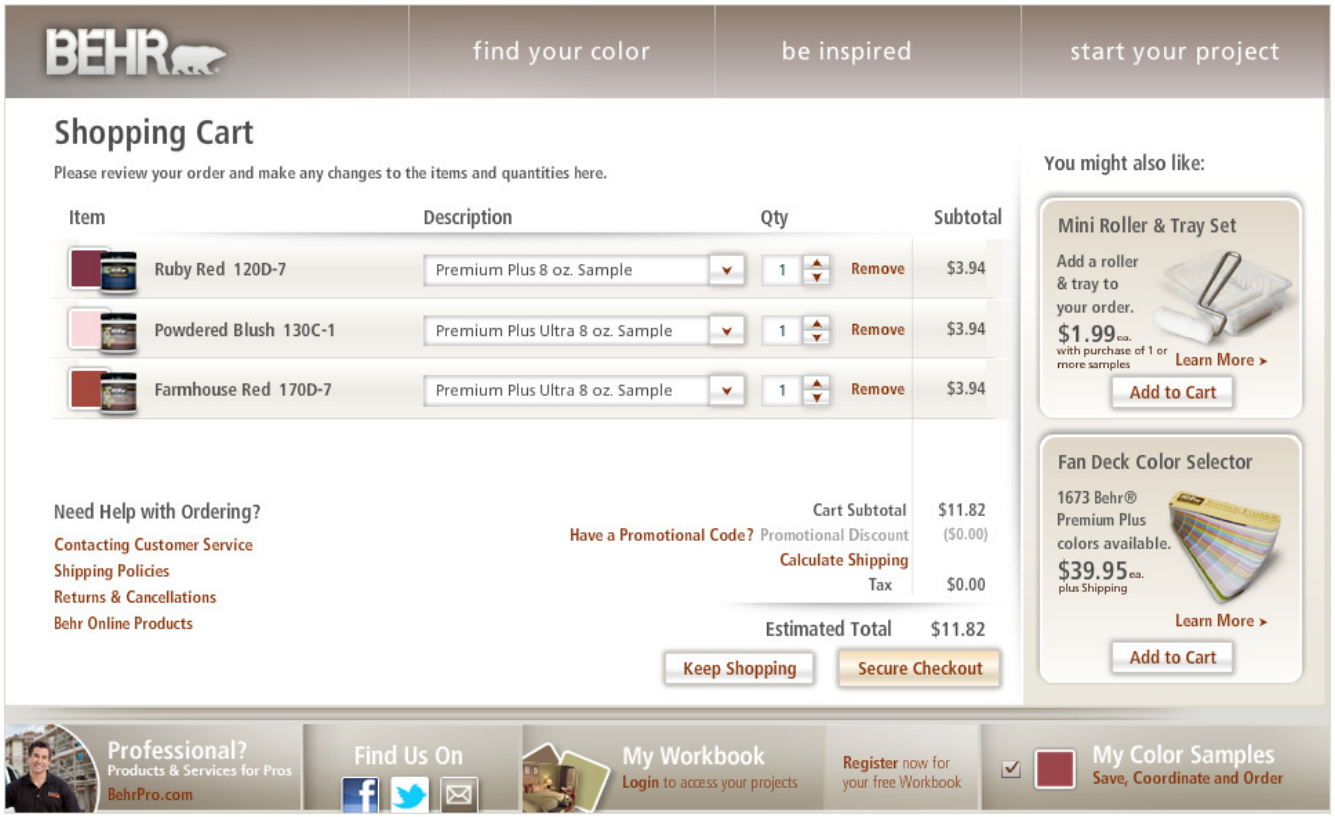


# Enterprise Applications

## Integrated, Enterprise Apps in a Private App Cloud



# Enterprise App Stores are Simply Web Stores that are Pointed Inside the Firewall




We've been building online retail Webstores for years….

# We will build our Apps with our Partners



# Continuing to invest in addressing your current and future enterprise application management needs



# Richard Anstey, Chief Architect



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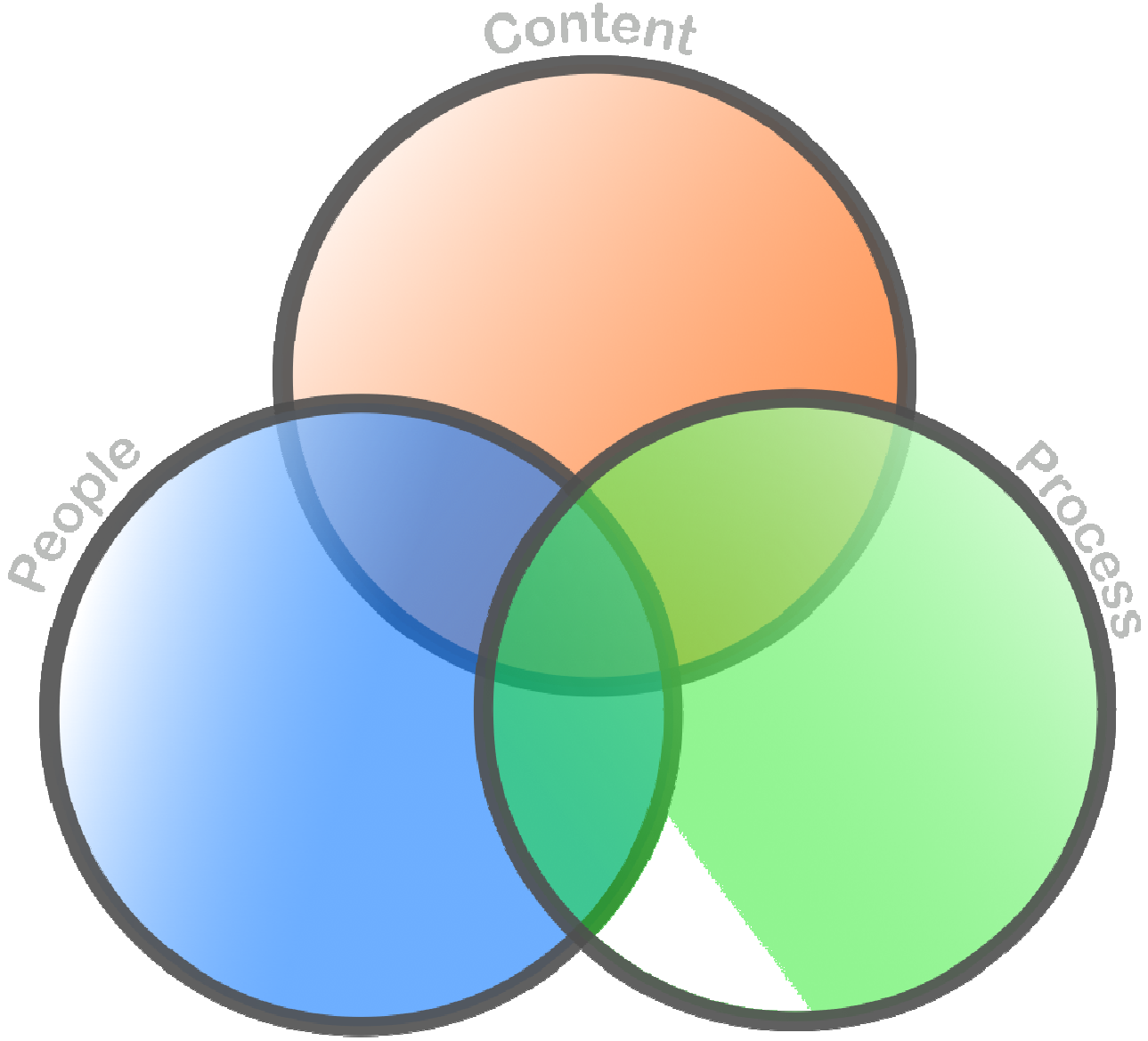
Content
People
Process

# Eugene Roman, Chief Technology Officer



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# In the future, ECM will be about ‘experiencing’ content on the go.



OPENTEXT | Tempo™

# Content On the Go…

Effortless file sync





**“Must Have App”**

# Sync and share content securely across multiple devices



# Create Mobile Apps Once and Deliver on Multiple Mobile Platforms




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# ECM Evolution

Social Apps,
Content Apps,
Process Apps



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# OpenText Innovation Incubator

Product / Customer Driven Ideas

Forward Looking Innovation

Thought Leadership eg Cloud Book

Open Text Innovation Center

Showcase Idea Labs

Fast R+D Prototypes

Agile Delivery

Consumerization of IT



Mine Product Base

Partners Ecosystems Hot Trends

TEXT
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# Adam Howatson, Senior Director, Product Management



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# OpenText Go-to-Market and Sales Update

- John Shackleton, President and CEO
- James Latham, Chief Marketing Officer
- Kamran Kheirolomoom, Senior Vice President and General Manager, BPS
- Robert Caldwell, Operations Manager, BPS
- Rich Buchheim, VP, Oracle Solutions Group
- Paul O'Donnell, President, Americas, Corporate EVP
- Dave Wareham, President, EMEA & Corporate EVP
- Graham Pullen, General Manager and VP APAC

Kamran Kheirolomoom, Senior Vice President and General Manager, BPS

Robert Caldwell, Operations Manager, BPS



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# Value Drivers Remain the Same

higher levels of **customer service**

better **team collaboration**

reduction in **operational costs**

**competitive** advantage

improved **cycle time**

**efficiency** gains

**consistent** SLAs

better **employee productivity**

improved **visibility**

**competitive** advantage

**faster** time to market

**paperless** office

improved **business performance**

proved **cost per transaction**

**faster** time to market

# But Business Dynamics Are Changing

distributed work teams

contextual content delivery

business visualization

electronic signatures

case handling applications

enterprise service management

touch interfaces

mobile employees

process guidance

cloud software solutions

automated tracking

electronic documents

rich customer experiences

process intelligence

social collaboration

# 2,500 Business Process Solution Customers



# Customers Realize Measurable Success

**Processed 70% more loans per month with 30% fewer resources**

**Saved $3 million and reduced risk with invoice automation**

**Recovered millions of dollars in credit claims and reduced resolution time from 2 weeks to 2 minutes**

**Reduced a two-day claims process to 20 minutes**

**Realized 700% annual ROI with enhanced efficiencies and productivity**

**Improved control over fuel delivery process and reduced manual work by more than 70%**

**gained 25% market share of UK ISA in 2 years**

**New store opening lifecycle shortened by 15%**

**80% error reduction with automated Cardholder Dispute Resolution system**




**£1 billion** change program targeted to improve revenue by £500m and reduce costs by £500m

HSBC



Nike recovered millions of dollars in credit claims and reduced resolution time from 2 weeks to 2 minutes



# United States Department of Justice avoided $31m in detention costs




Nationwide Building Society gained 25% of UK ISA market share in 2 years

Nationwide



# US Air Force Realized 700% annual ROI with enhanced efficiencies and productivity

U.S. AIR FORCE

Rich Buchheim, VP, Oracle Solutions Group



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# OpenText and Oracle
## An Expanding Partnership

- New Cooperative Activities
- Last year, OpenText obtained a source and distribution license for core Oracle information management technology (Oracle CM SDK)
- CM SDK provides OpenText a “fast path” to delivering an Oracle-centric version of Extended ECM
- Oracle has identified archiving, information governance, and E-Discovery as key whitespace areas for OpenText partnership
- Oracle and OpenText are now jointly developing infrastructure based on CM SDK to support filling these whitespace areas and delivering Extended ECM for Oracle with expanded Oracle platform uptake
- Joint sales activities have also been initiated to bring advanced OpenText solutions for content-enabling Oracle apps to Oracle customers

Paul O'Donnell, President, Americas, Corporate EVP

Dave Wareham, President, EMEA & Corporate EVP



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# Segmentation Strategy – Go-To-Market Model

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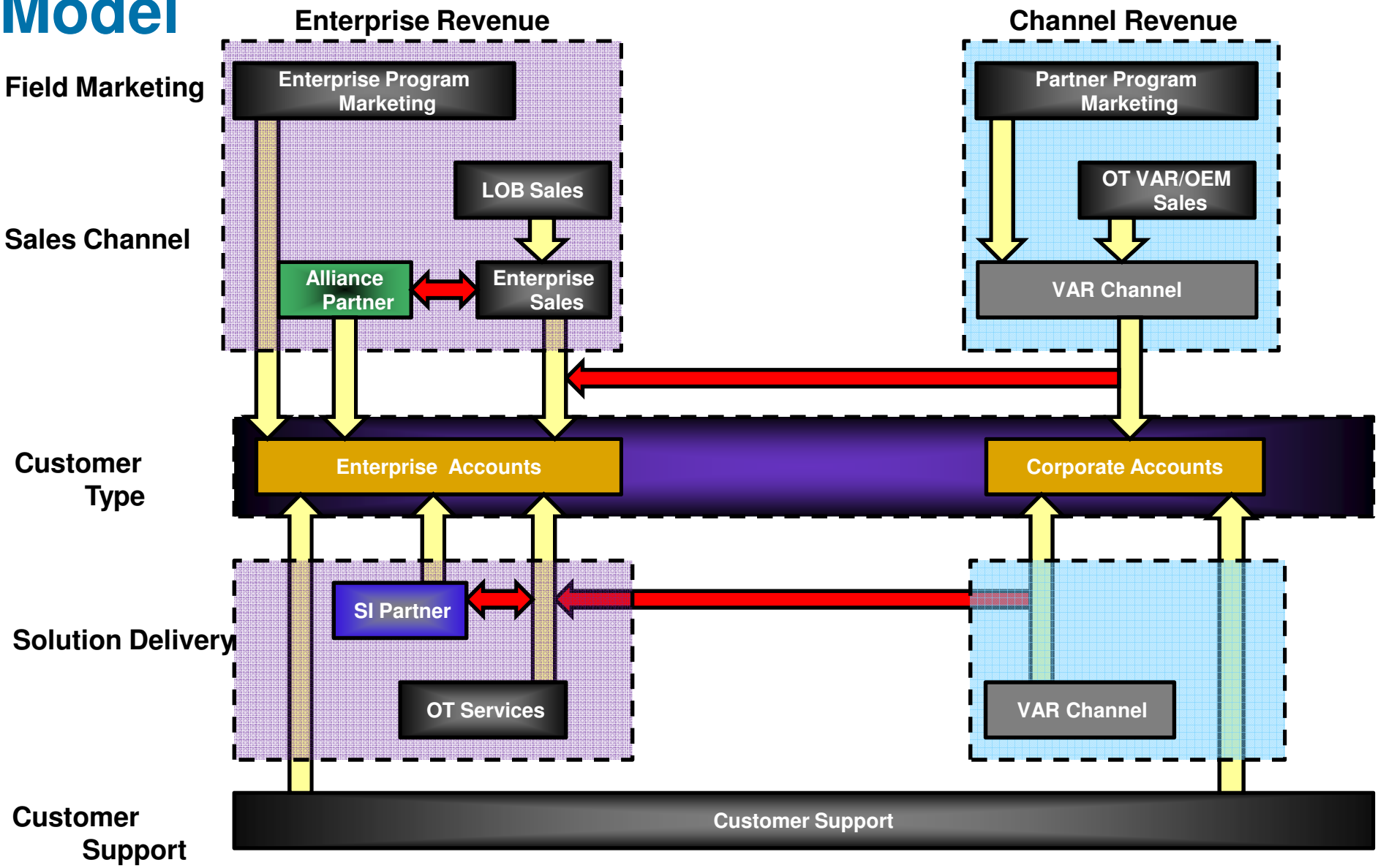
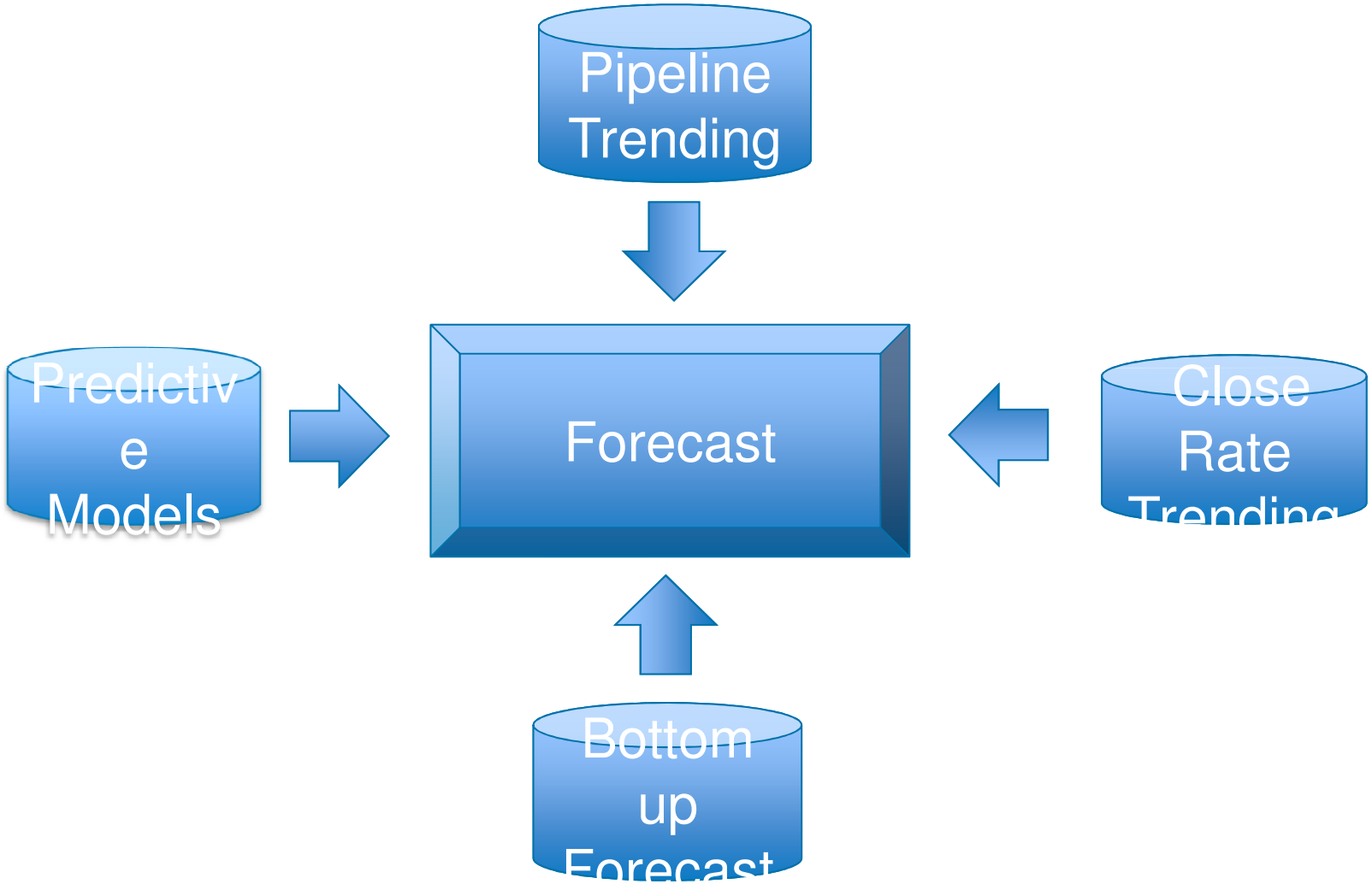


# Pipeline & Forecast Management



# Forecast Coach/Deal Scoring

