



Building Clouds to Accelerate New Services

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Digital Transformation Is Driving New IT Imperatives



INSPIRE
innovation with
the cloud



BUILD
clouds to accelerate
new services



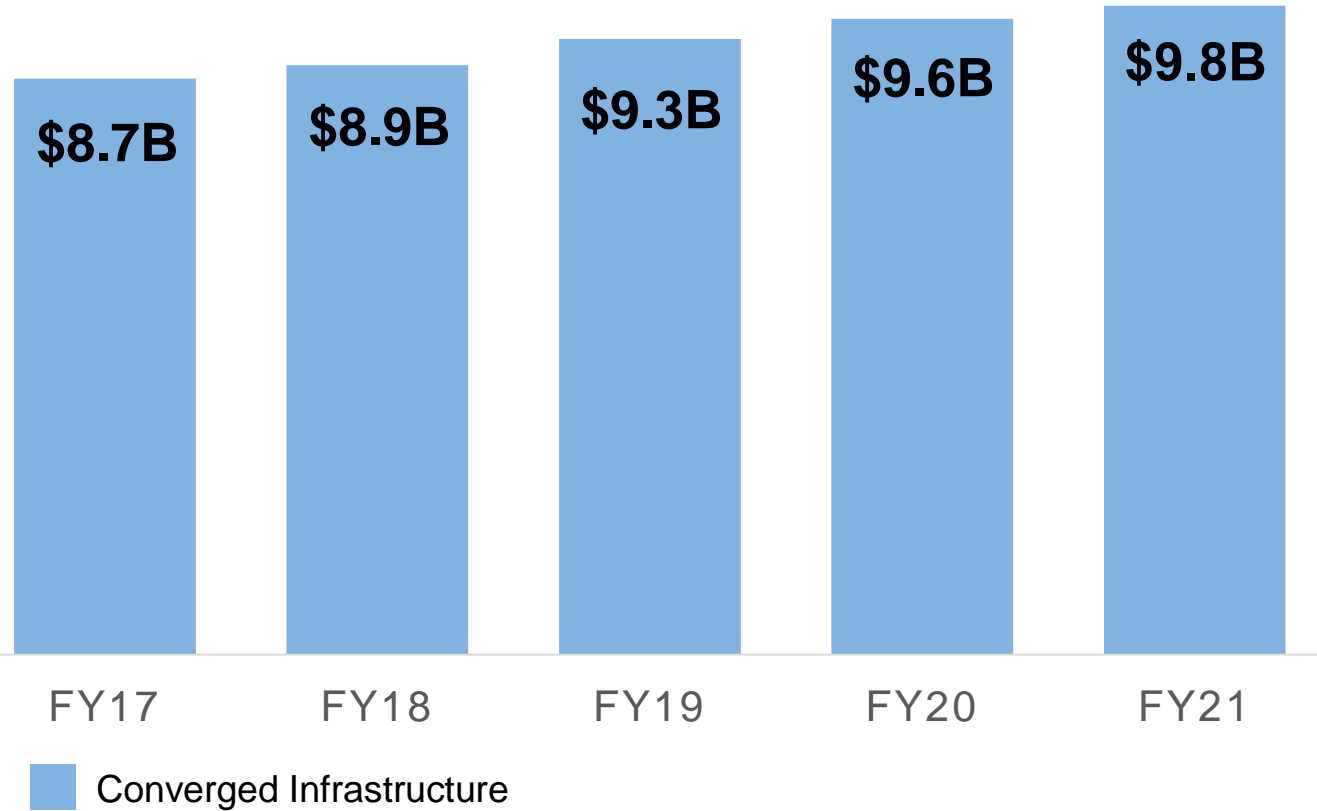
MODERNIZE
IT architecture with
cloud-connected flash

Opportunity: Continue to Lead in Converged Infrastructure

NetApp is gaining share at the expense of others

CAGR

3%



Converged Infrastructure

- Driven by customers' need to modernize and simplify infrastructure
- Taking share from the full-stack providers
- Expanding opportunity through new partnerships

Source: Worldwide and U.S. Enterprise Storage Systems Forecast, 2017–2021, IDC; Worldwide Enterprise Storage for Public and Private Cloud 2015-19; Segment Forecasts by IDC; NTAP Market Intelligence

NetApp CI Addresses the Needs of Enterprise Customers

NetApp's winning formula for converged infrastructure

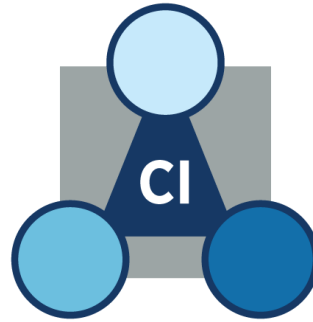
Traditional CI Approach

Rigid architecture

Not best-of-breed

Application-specific

Siloed



NetApp's Approach

Flexible architecture

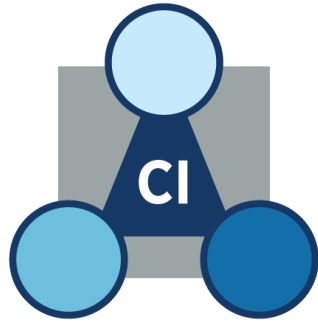
Validated solutions

Multi-app consolidation

Data Fabric connected

Out-Performing the Market with Our Converged Solutions

NetApp has proven partnerships, ecosystem, services, and a 9-year track record



~\$2.0B annually per IDC

Growing faster than the market

Taking share from all other CI vendors

#1 CI solution for capacity with 4000+ PB shipped

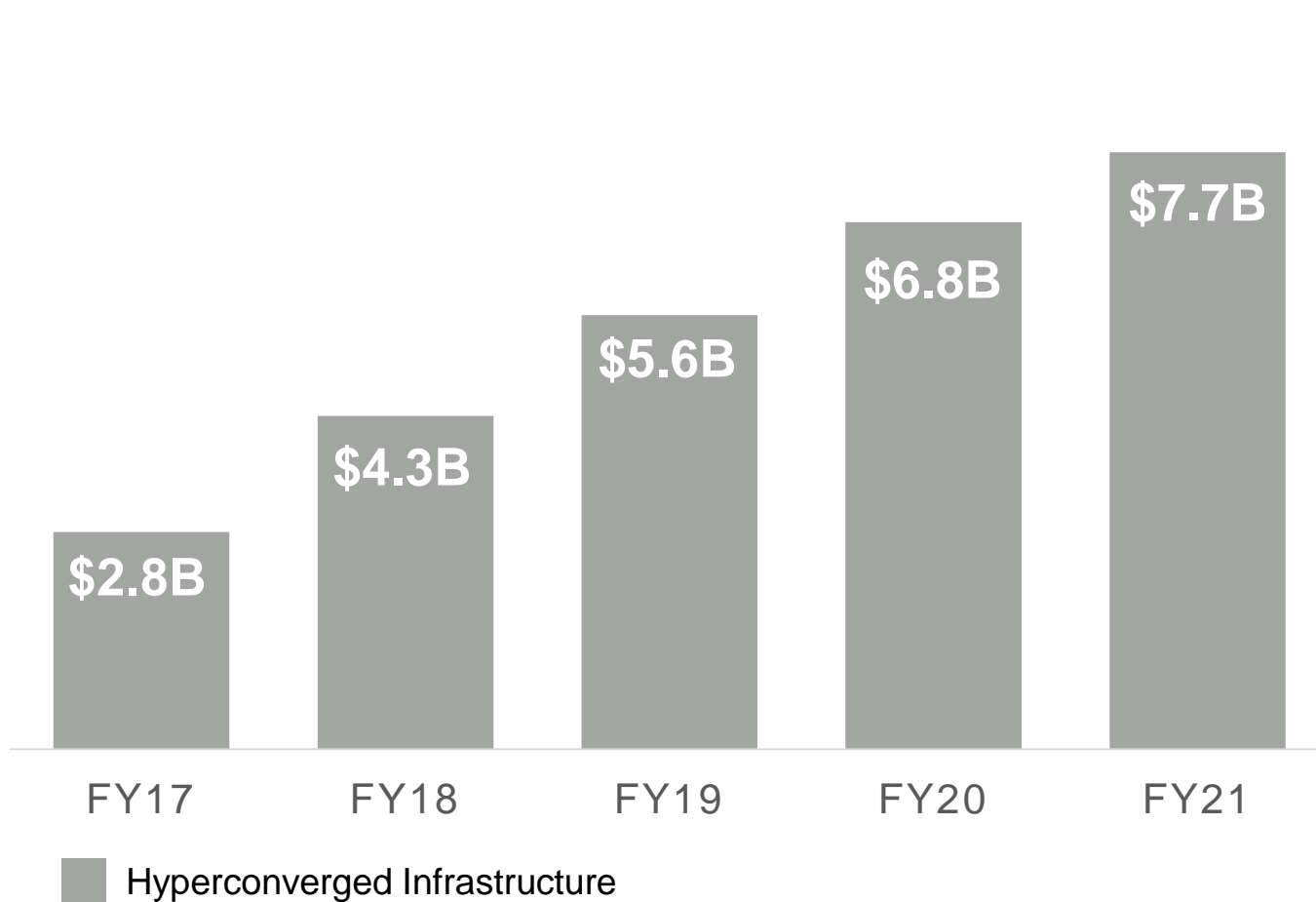
Expanding applications, services and partnerships

2017 TechTarget Impact Award

“Best Converged/Hyperconverged Infrastructure”

Opportunity: Lead in Enterprise HCI

Enterprise spending is fueling HCI growth



CAGR

29%

Hyperconverged Infrastructure

- Driven by customers' desire to operate with hyperscaler-like flexibility
- Launched Q2FY18
- Expanding wallet share
- Expect significant share gain

Source: Worldwide and U.S. Enterprise Storage Systems Forecast, 2017–2021, IDC; Worldwide Enterprise Storage for Public and Private Cloud 2015-19; Segment Forecasts by IDC; NTAP Market Intelligence

The Right HCI for the Enterprise

Applying our converged ecosystem and enterprise expertise to HCI

Traditional HCI approach

Simplified deployment

Converged nodes

Small deployments

App-specific



NetApp's Approach

Simplified operations

Efficient performance

Multi-tenant

Mixed workloads

Only NetApp offers public cloud architecture for private cloud

Why NetApp HCI Wins

Delivering enterprise HCI capabilities to customers



The right HCI for enterprise

- Thousands of nodes installed at enterprise scale
- Developed for cloud service providers from the start
- Simplified operations
- Enterprise capabilities
- Ecosystem of go-to-market partners
- Global services and support
- Data Fabric integration

Focused Execution for Accelerated Success

Investing in end-to-end go-to-market execution

Marketing

- Leading with cloud message and Data Fabric capability
- Targeting new buyers with demand gen to ramp HCI
- Creating buyer-centric programs and messages
- Driving clear position and value prop for HCI/CI/Flash

Sales

- Executing focused sales imperative
- Dedicating Cloud Infrastructure sales resources
- Aligning sales compensation structure
- Expanding CI channel participation

Early Success Indicators

Our value proposition is resonating with enterprise customers



Achieved 1st quarter plan (Q3 FY18)

Winning targeted workloads

Reaching customers globally

Winning in existing and new accounts

Customers Are Building Clouds to Accelerate New Services

Recent NetApp HCI deployments delivering value from day one



“Our mission is to deliver value from the cloud to existing businesses and to position customers to evolve to the next stage. Our business is the same: we have to identify opportunities and get them to market as quickly as possible.”

Benjamin Molloy, Division Lead
Consultel Cloud

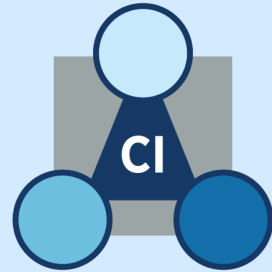


“We assimilated NetApp’s HCI within our systems in a short period of time. The product offers us very good performance. We conducted an extremely rigid stress test and got very good results.”

Roman Podlisk, Director of IT Operations
Imperva

Complementary Capabilities for Enterprise Customers

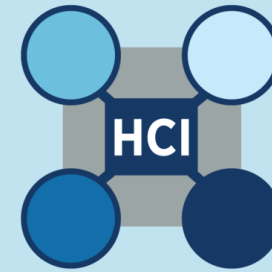
CI and HCI provide unique advantages to different buyers – and enterprises are deploying both



Multiple infrastructure buyers

Infrastructure mindset, storage-driven

Core enterprise and industry-specific apps



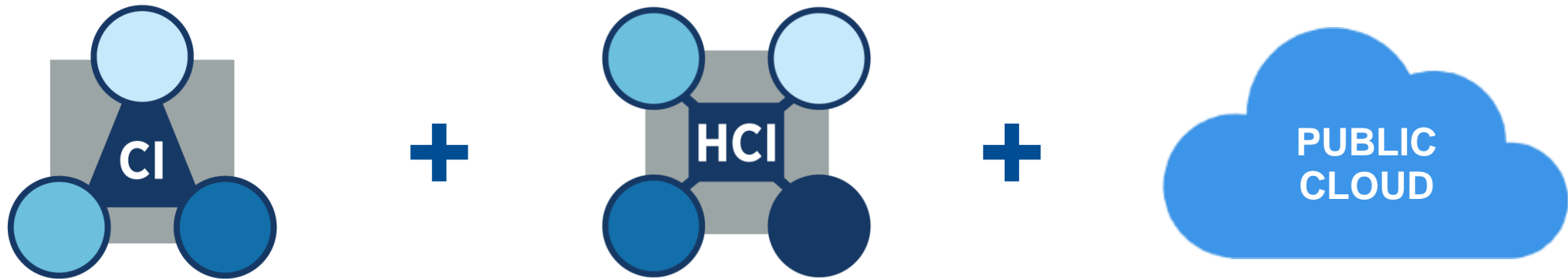
Single buyer/consumer

Cloud/Virtualization mindset

Mixed and unpredictable workloads

Scale and operate like a hyperscaler

Only NetApp Offers Public Cloud Architecture for Private Cloud



Complete end-to-end solutions for the enterprise

Industry-leading portfolio unified by the NetApp Data Fabric



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