TT&H

Telco, Technology, Travel, Hospitality, Entertainment, Media

Watch, play, talk, surf, drive, fly and stay vertical…

DELL

Changing Landscape

The connected guest

Digital behavior:
Interactions while on the move

Proof points:
In 2013, 86% growth in Mobile bookings and 85% growth in visits over 2012

The informed guest

Digital behavior:
Seeks information before committing

Proof points:
81% of online travel bookers checked out videos before committing to a purchase

The social guest

Digital behavior:
Instantaneous experience sharing

Proof points:
70% update their Facebook status while still on vacation

The Young and Restless guest

Digital behavior:
Expects express service, personalized

Proof points:
80% want to set their personal preferences: dietary needs, bed type, for a more personalized stay

Uninhibited and instantaneous influence on a hotel's reputation

Redefining the norm of guest experience…

A 1% increase in a hotel's online reputation score produces a 0.89% increase in ADR, a 0.54% increase in occupancy and a 1.42% increase in RevPAR

Sources – HFTP Hotel yearbook 2014, Hospitality.net, statisticbrain, hebsdigital

Guest Empowerment Movement

Guest Example:

Name:	John Doe	**Room preferences:**	King-size bed, pool facing, non smoking and away from elevators
Age:	35 years		
Home:	Dallas, TX	**Food:**	Vegan food, prefers red wine
Type of traveler:	Business transit	**Activities:**	Sports, specially Basketball

Hotel search
Web or mobile app

Room booking
Online booking

Promotions

E-check-in
Check-in up to 24 hours prior

Feedback

Arrival

E-checkout

Dining

In-room experience

E-key

Much more to come…

- Straight to Room
- Keyless Room
- Automated Services (Check-in / out, Selecting Room, Room Service, Food Service on Property)
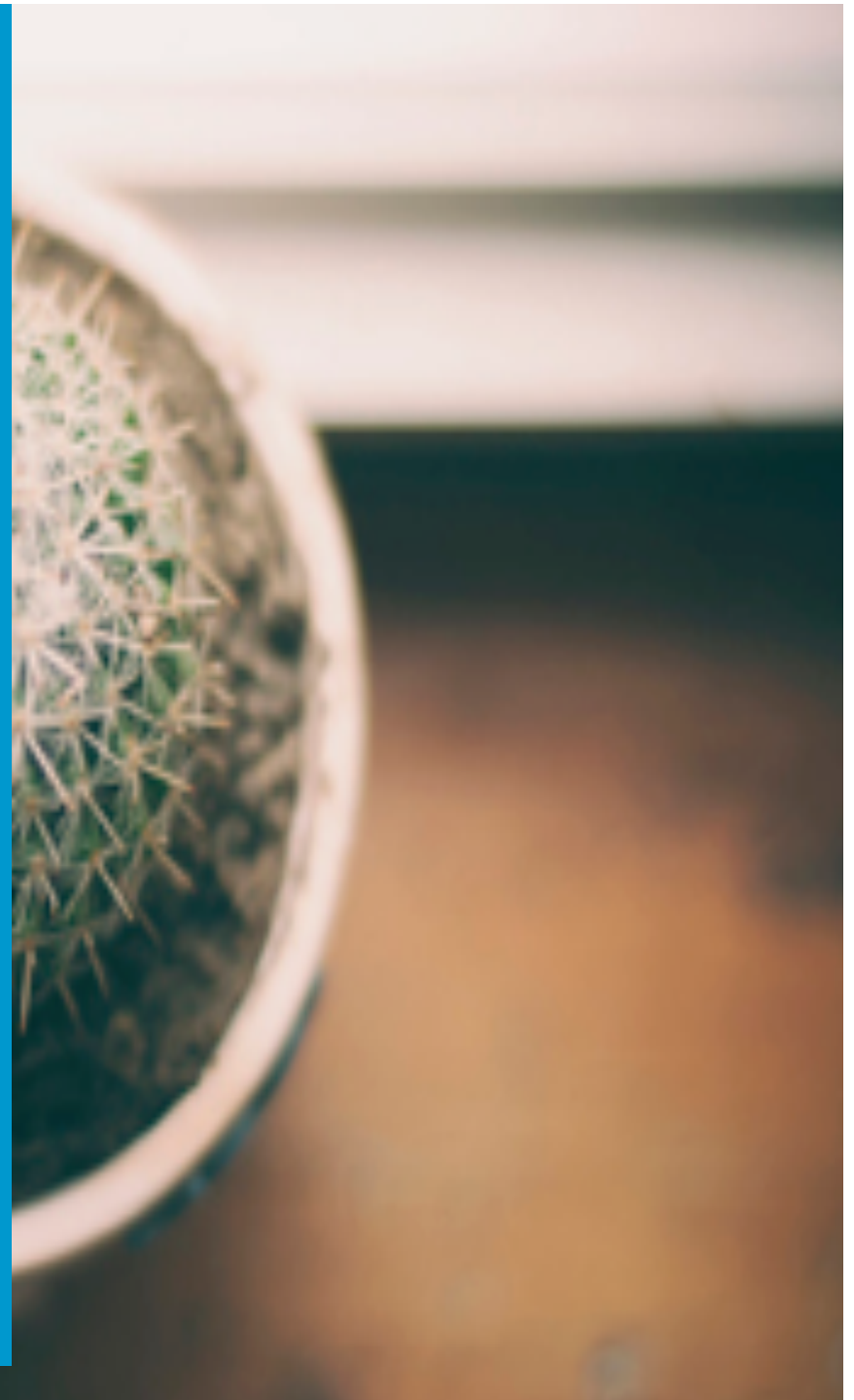- Back-of House Automation

Our **entrepreneurial heritage** is the foundation of who we are and what we do.

We've always believed **there is a better way** to enable organizations, communities and people everywhere **to achieve** whatever goals and dreams matter the most to them.

We started on this journey when we revolutionized the PC—and we're doing the same for the next-generation of **technology solutions**.

Our **customers** inspire us each and every day to **make technology simpler** and **easier to use**. To **drive out inefficiency**. To create solutions that deliver better **long-term value**.   All of this gives them the **power to do more** so they can reach their **full potential**.
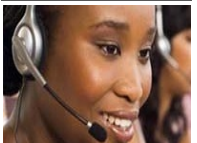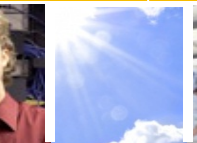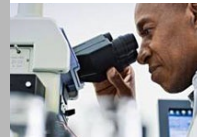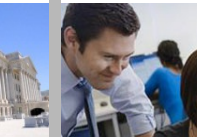
Recognition & Industry Expertise

11 Outsourcing Excellence awards since 2004

Leader & Star Performer

Everest Group IT Outsourcing in Healthcare Payer Industry PEAK Matrix Assessment

#1 in worldwide Microsoft Windows deployments

Leader

Data Center Outsourcing and Infrastructure Utility Services, North America, Gartner Magic Quadrant

Seven

Microsoft Partner of the Year Awards

Digital Vendor

Recognized by Forrester, Dell Brings Social, Mobile, Analytics, and Cloud application services under one practice

Leader & Star Performer

Healthcare Provider Industry PEAK Matrix Assessment, Everest Group

#1 IT healthcare services worldwide for Healthcare Providers, Gartner

Leader

Insurance BPO – Service Provider Landscape with PEAK Matrix Assessment, Everest Group

Comprehensive portfolio of service offerings, with industry expertise and flexible engagements

Applications	Business Process	Digital Services		Infrastructure		Deployment	Support	Security
Application Services	Business Process Services	Data Intelligence, Social Media Internet of Things	Business & IT Consulting	Infrastructure Managed Services	Cloud Services	Configuration and Deployment	Support Services	Security Solutions

Financial Services & Insurance	Healthcare & Life sciences	Federal Government	State & Local Government, Education	Telecom, Travel, Hospitality, Media, Entertainment & Technology	CPG, Retail & Logistics	Manufacturing	Energy

On-site
- Account management
- IT and business consulting
- Systems integration
- Facilities management

Regionally centralized
- Hosting / VDI / Managed virtual client
- Business continuity / disaster recovery
- Cloud, data and security management
- IT operations, engineering, administration

Globally delivered
- Network / Security operations center
- Applications / Business process services
- SaaS / IaaS
- Remote infrastructure management outsourcing

Accelerating innovation with Dell Services

As a pragmatic partner, we are focused on helping you **transform, connect, inform** and **protect** your business.

Transform

Modernize apps and infrastructure

- Data center and end-user IT outsourcing
- Infrastructure consulting
- Infrastructure and apps modernization
- Cloud consulting and management

Connect

Anytime, anywhere, any device access

- Mobility/BYOD consulting
- App development and mobile app services
- Desktop virtualization
- OS migration and unified communications & collaboration

Inform

Unlock the value of information

- Social media services
- Storage deployment and data migration
- Business intelligence and analytics
- SAP HANA services
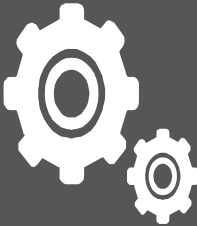
Protect

Proactively protect the business

- Managed security services
- Threat intelligence
- Security and risk consulting
- Incident response and digital forensics
- Data protection

Practical Innovation

Powering our R&D strategy in three ways

Build

- Best-of-breed platforms
- Organic innovation
- Integration across all elements

Partner

- Joint product and solution engineering and testing
- Common strategic roadmaps

Acquire

- $18 billion and 21 acquisitions
- Full adherence to the Dell design philosophy

Dell Services
Global reach and growing

NPS scores highest in IT Services industry

#1 in online support response time (TBR)

9 Gartner Magic Quadrants in which Dell is identified as a Leader

7 Outsourcing Excellence Awards (Outsourcing Center/ Forbes)

Support :
- 111M systems
- 100+ languages

Manage:
- 2.5M clients
- 6.2M systems/ mailboxes managed via SaaS

Monitor:
- 13B security events daily for 3,000 customers

Process:
- >250M travel records
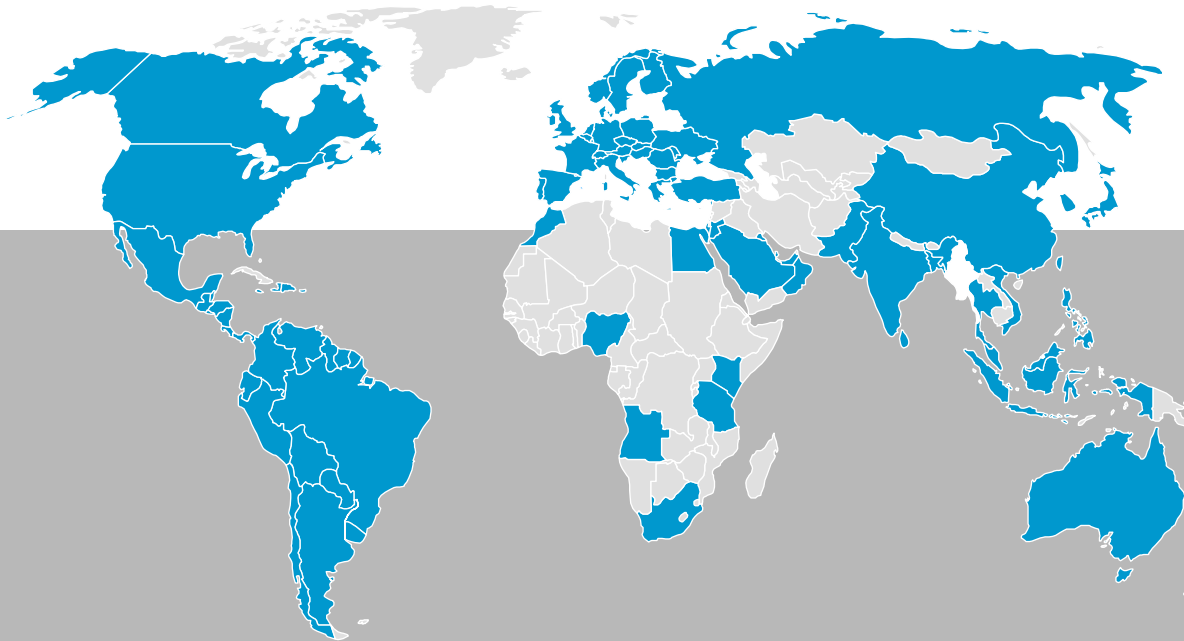
Dell IT saves **$200M** over two years through standardization, consolidation and automation. Reduces maintenance costs to **<50%** of IT spending

43,000 team members | 100+ countries | 60 tech support centers | 7 global command centers

9

Travel and Hospitality Solution:

Agency commission and reconciliation
Over $2B Commissions processed each year

Increased Brand Preference in Travel Agent Recommendations

Lower Cost through Automation

Global Billing and Payment Platform

>200k	Hotel, travel agencies, websites, and other intermediaries receive payment each year	>$7B	Agency transactions represented in Revenue	>250M	Travel records process per year

Travel and Hospitality Solution:
Customer Loyalty Program

Stronger customer incentives by utilizing customer behavior and spend analytics

Highly scalable & customizable engines Single Integration Platform and flexibility

Reduce operational costs by eliminating manual processing

Collaborative Governance & Delivery Assurance Dell's 3PMM methodology

Travel and Hospitality Solution:
Franchise program

Increase Franchise tenure with

Higher & Faster
Rate of Franchise adherence to Brand standards

Improved Back Office Service alignment between Franchisee & Brand

Reduce costs through elimination of manual processes
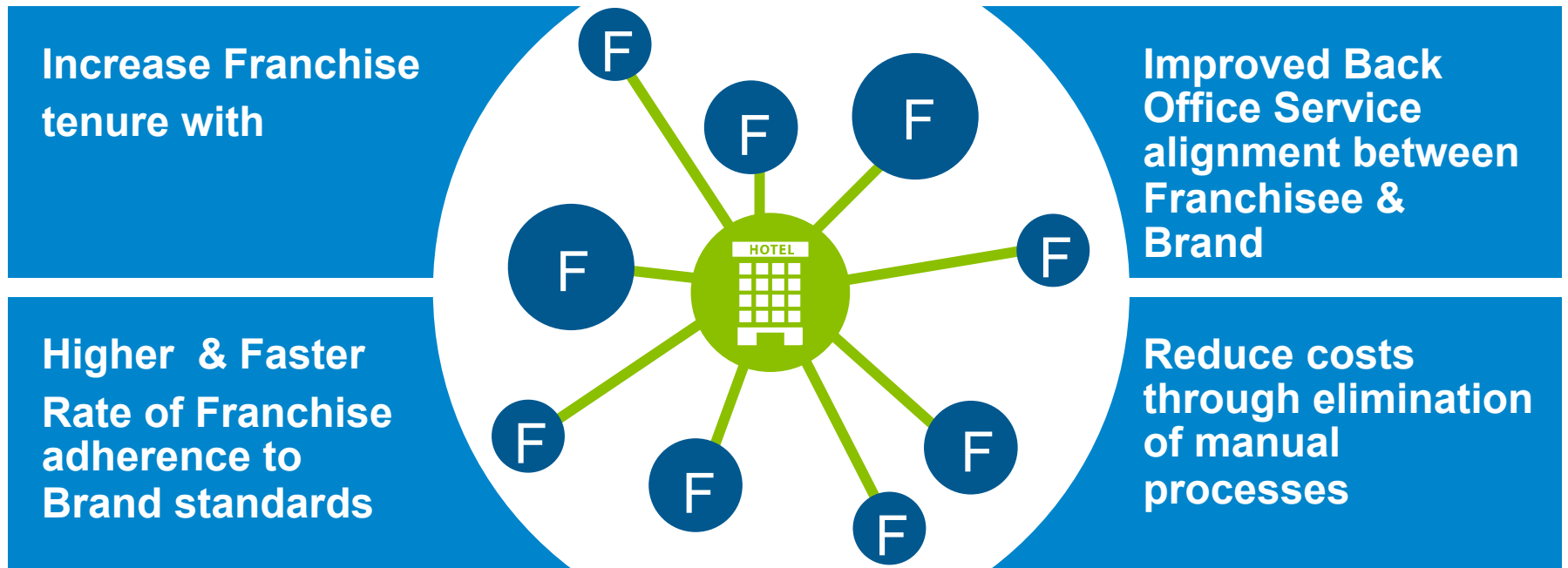
Dell Services highlights and areas of focus

Strong customer wins

Superior customer experience & long-term relationships

Leveraging Dell IP
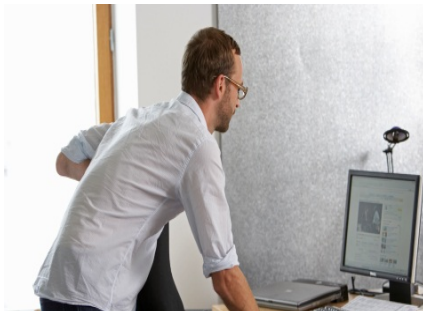
Investing in innovative solutions

Thank you

The Backdrop

The World is becoming increasingly digital

Business enterprises are taking the plunge into digital – their intent and interest evidenced in actual $ spend

Mobility

58%
CIOs already have a mobility strategy in place

46%
CIOs plan to change business processes, workflows and employee roles for mobile initiatives in 2013

30%
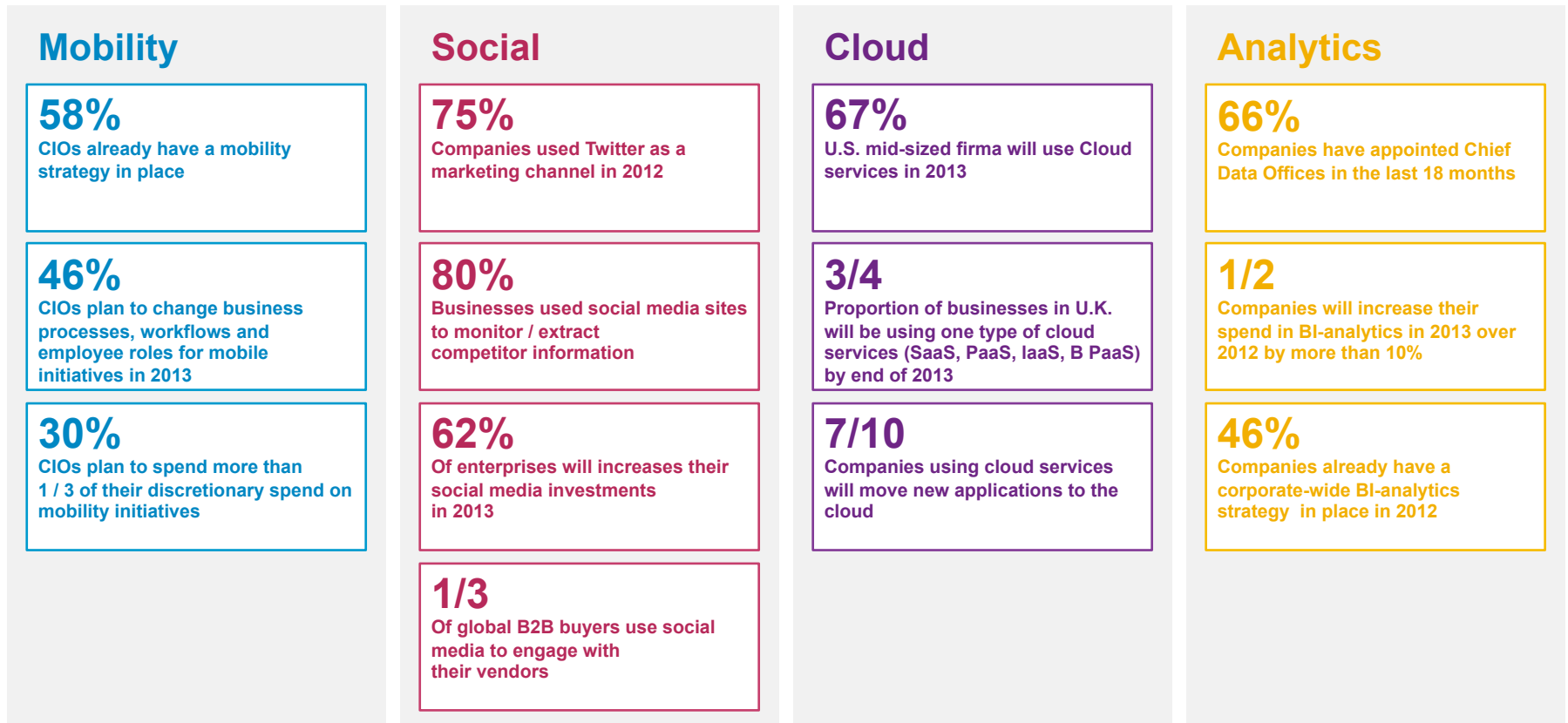CIOs plan to spend more than 1 / 3 of their discretionary spend on mobility initiatives

Social

75%
Companies used Twitter as a marketing channel in 2012

80%
Businesses used social media sites to monitor / extract competitor information

62%
Of enterprises will increases their social media investments in 2013

1/3
Of global B2B buyers use social media to engage with their vendors

Cloud

67%
U.S. mid-sized firma will use Cloud services in 2013

3/4
Proportion of businesses in U.K. will be using one type of cloud services (SaaS, PaaS, IaaS, B PaaS) by end of 2013

7/10
Companies using cloud services will move new applications to the cloud

Analytics

66%
Companies have appointed Chief Data Offices in the last 18 months

1/2
Companies will increase their spend in BI-analytics in 2013 over 2012 by more than 10%

46%
Companies already have a corporate-wide BI-analytics strategy in place in 2012

Digital businesses are 26% more profitable, generate 9% more revenue and exhibit 12% higher market valuation ratios – MIT Sloan research