



ICEMAN

— AKA SANDRA FRAGA —

Our target – next level growth



Our landscape

Supply chain disruptions
but forecasted to improve



Strong dollars is a major
challenge for emerging
markets



Post pandemic recovery



Escalating insecurity :
Climate impact and disturbances



Economic instability:
Inflation and rising interest rates



War in Europe:
Geopolitical fragmentation



Cost of living crisis : Food and
energy (gas and fuel)

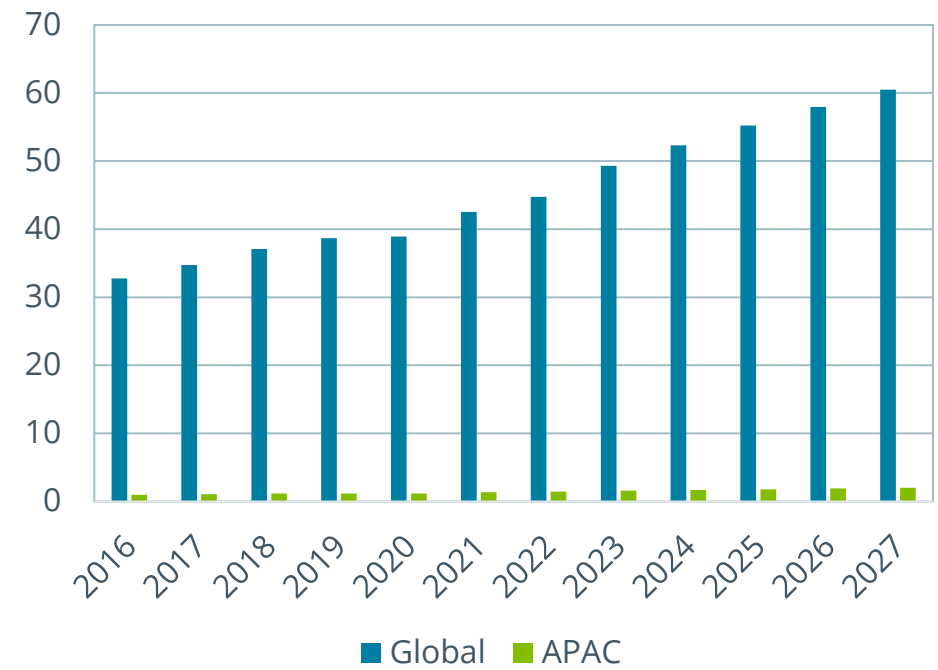
Our opportunity

The global ERP market has recovered from the impacts of the covid-19 pandemic and is forecasted to grow at an annual rate of **6.2%** to reach **revenues of US\$60.47 billion**, mostly from North America

Global ERP Market Size and Growth

- Revenue in the worldwide ERP Software market is estimated at US\$ 44.75 billion by the end of 2022, with the projected market size for 2027 expected to reach US\$ 60.47 billion.
- The APAC region accounts for 3% of the global ERP market, with North America (NA) and Europe (EU27) accounting for the largest share, 53% and 17%, respectively.
- The on-premise segment accounted for 55-70% of the market share in 2021. By 2030, the cloud segment is expected to dominate the market owing to increased industrial digitalization and automation. It also offers benefits such as faster implementation and lowers initial upfront investments.
- Over 60% of organizations currently choose cloud-based ERP systems over on- premise software, with 14% of the organizations who chose an advanced ERP solution switching from their legacy system.
- **North America = 53% of market**
- APAC Region = 3% of market

Software revenue of Total ERP Market, US\$ billion, Global and APAC*, 2016-2027



*APAC: include Australia, New Zealand, Singapore, Indonesia, Thailand, Malaysia and the Philippines
Source: Frost & Sullivan, World Bank, Grand View Research, Allied Market Research

Win as a team



Our mission



Our mission – Growth

What?

How?



Revenue, Users,
Margin (RUM)



FY23 \$76 423 Million

#Roadto3000

Users

#Roadto150

Net New Deals



TMS Focus

Electronics, Fabricated Metal,
Food & Beverage and IM&E

Focus
on real
pipeline

Lead
Qualific
ation

Mid-Market



Earn Trusted
Advisor Status

>20+ User
Band

Win with
Partners

Improve
win rate

Solutions Selling – Understand need
and adding value to our customers.



Demo strategy



Increase
average
deal size



Improve
speed to
lead



Increase
revenue
per head



Our mission – Channel Acquisition and maturity



Channel acquisition in America, Australia and UK is a priority, re- onboard and develop Asia partners

Mature and develop partners in Africa



With channel and through channel



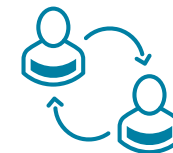
Implement channel business planning sessions



Consolidation of partners where appropriate



In FY23 H1 **identify cross regional partners (International partners)**



Channel QBR's



Continue PAC meetings



Develop partnerships with **key alliances** ie Microsoft.

ISV adoption and acceleration



Our mission – Customer experience



Network effect



Focus on Retention



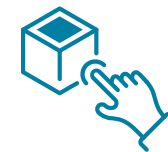
Reduce churn
– stop the leak



Land and expand approach



Keep our customers current on SYSPRO 8



Analyze module utilization



Be referenceable and referable

Our mission – Industry focus



Manufacturing & Distribution Sectors



TMS Focus

Electronics, Fabricated Metal, Food & Beverage and IM&E



Solutions Selling – Understand need and add value to our customers.

Industry playbooks and demo platforms



Add value by being the **trusted advisor**



Product Management monthly calls



Access to industry and domain experts



Product Management SWAT team for key releases

Our mission – Sales enablement and standardization



Pipeline Management



Improved forecast accuracy



Standard sales methodologies



Standard operating processes



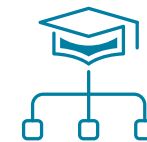
Key Sales metrics tracking



Implement standard sales tools ie Hubspot CRM; CPQ tool



LearnIt courses



Global ISV Webinars





TAKE IT TO THE

NEXT LEVEL



 **SYSPRO™**