



**Cisco** ASEAN Virtual Partner Conference

# ASEAN Small Business & 2020 Asia Pacific SMB Digital Maturity Study

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# The Small Business Market is Exploding

**Small business is anything but small.**

Small businesses generate half of global GDP and employ two-thirds of the global workforce.<sup>1</sup>

Small businesses already account for **44% of all IT spending**<sup>1</sup> – and as a segment, they're growing faster than enterprise.



Employ 2/3 of the  
global workforce



of all businesses  
worldwide



Create 1/2 the  
world's GDP



SMB IT spend by 2028

(Source: SMB Global Overview –  
TechAisle – Jan 2018)

Cisco is ready to help partners capture this opportunity.

# IDC: 2020 Asia Pacific SMB Digital Maturity Study

# 2020 Asia Pacific SMB Digital Maturity Study



Australia



China



Hong Kong



India



Indonesia



Japan



Malaysia



New Zealand



Philippines



Singapore



South Korea



Thailand



Taiwan



Vietnam

**1424 respondents**



## Role

Manager-level and above, such as business owners, CEOs, directors and heads of departments



## Company Size





**50-499**  
employees



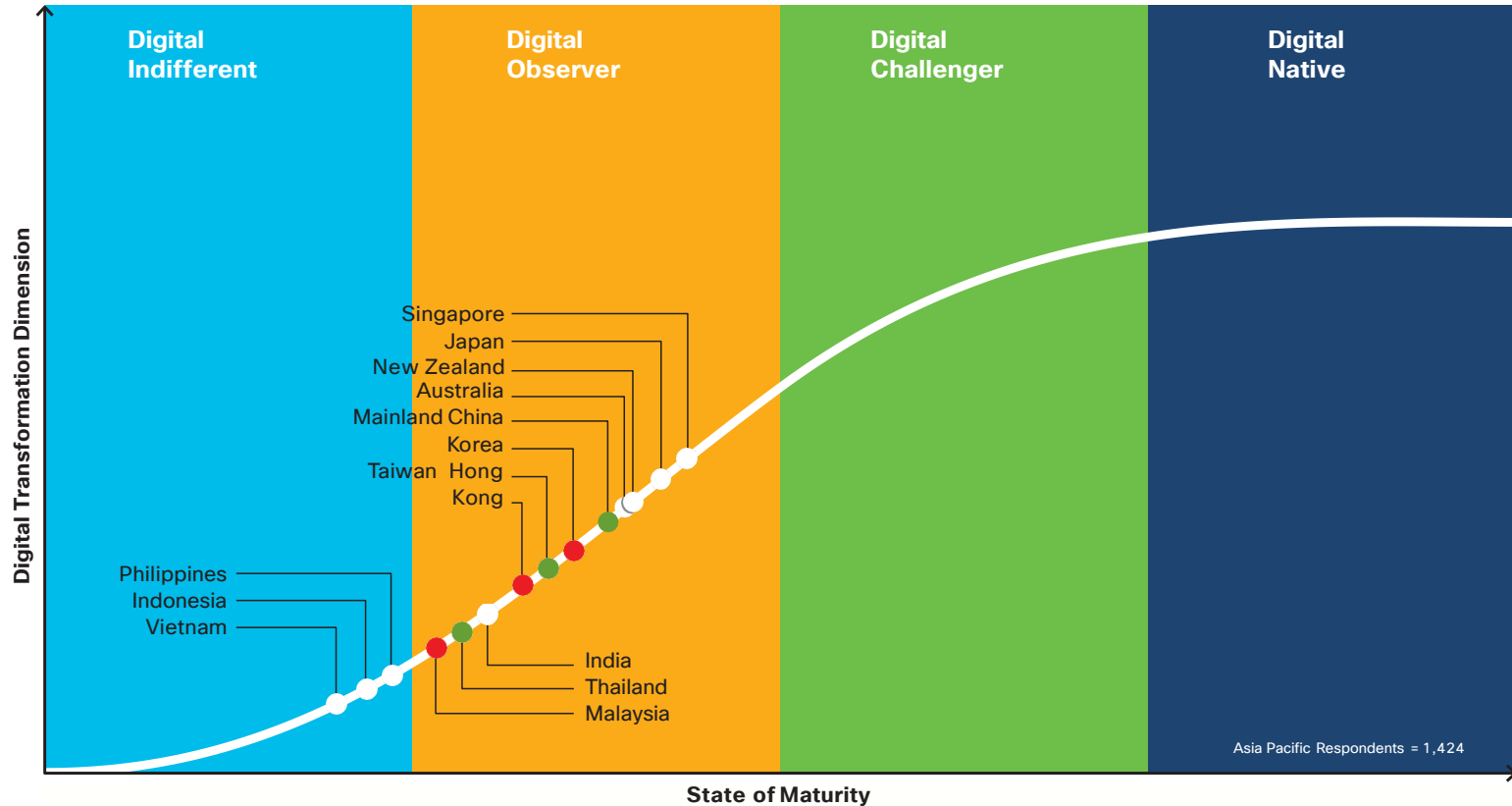
## Industries

Construction	Resources	Telco
Financial	Media	Utilities
Services	Retail & Wholesale	
Manufacturing	Services	

# The four stages

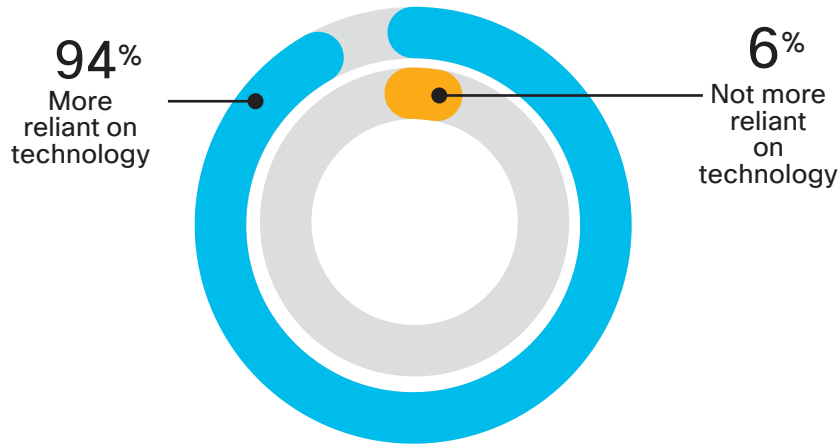
SMB Digital Maturity Index	Stage 1 Digital Indifferent	Stage 2 Digital Observer	Stage 3 Digital Challenger	Stage 4 Digital Native
 <b>Strategy and Organization</b>	<p>Company is reactive and focused on efficiencies. No digital efforts exist or starting.</p>	<p>Digital efforts in progress but tactical. Starting to create a digital plan.</p>	<p>Company focused on becoming agile. A digital strategy exists, but focused on short-term.</p>	<p>Holistic strategy to digitally innovate exists. Proactively seeking to transform the market, expand operations and drive CX.</p>
 <b>Processes and Governance</b>	<p>Majority of processes are manual.</p>	<p>Many processes still not automated. Focused on addressing inefficiencies.</p>	<p>All core processes are automated and productivity rates improving.</p>	<p>Full process automation done; agile approach. Significant strides made in process transformation.</p>
 <b>Technology</b>	<p>Tactical investments. No cloud and spreadsheet centric.</p>	<p>Some cloud resources being used. Very limited use of analytics. Focused on the use of reporting tools.</p>	<p>There is a tech roadmap for digitalization. Company is using hybrid cloud approaches.</p>	<p>Cloud-first and committed to using digital tech. Broad adoption of analytics.</p>
 <b>People And Skills</b>	<p>Lack of digital skills.</p>	<p>Making tactical investments to acquire digital skills. Risk-averse leadership.</p>	<p>Strategic Investments in talent are being made, particularly digital skills.</p>	<p>The right digital skills exist. Talent is a top priority and a competitive differentiator. Agile and adaptable culture.</p>

# ASEAN SMBs are across the first 2 stages of digital maturity

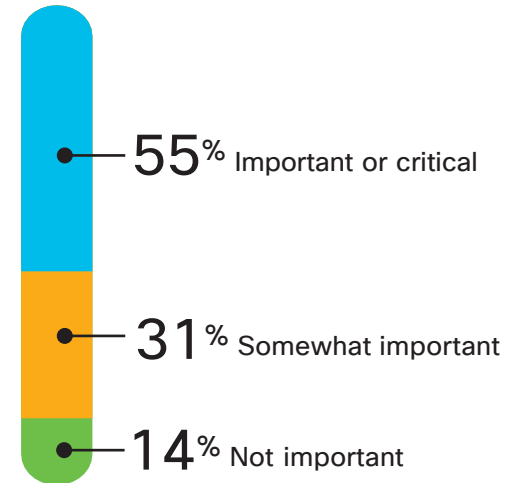


# SMBs are relying on technology to digitalize their businesses and become resilient

**Has COVID-19 made your company more reliant on technology?**

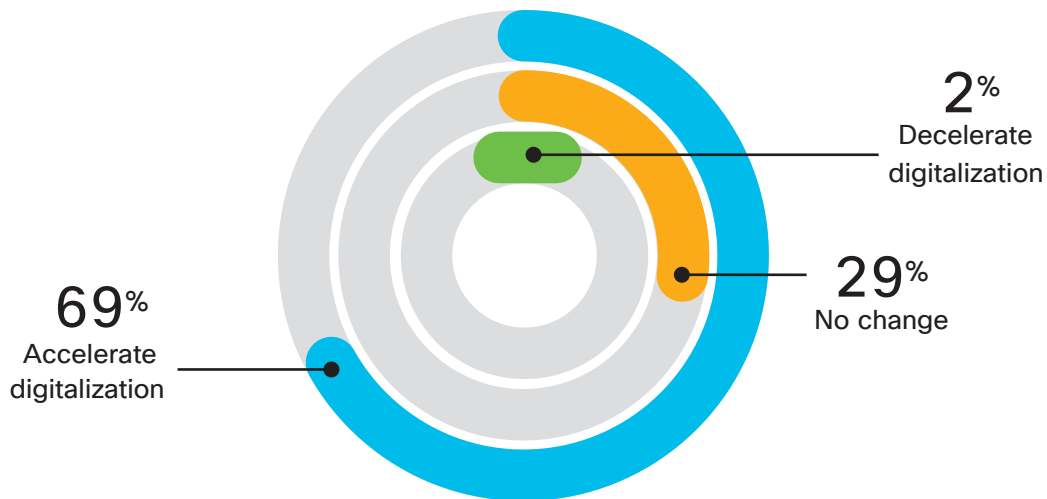


**How important is business digitalization (having digital products, offerings, digital payments, ecommerce, etc.) in building resilience and being able to quickly adapt to disruptive events like COVID-19?**



# Nearly 70 percent say they are accelerating the digitalization of their businesses as a result of COVID-19

**Is COVID-19 going to accelerate the digitalization of your business?**





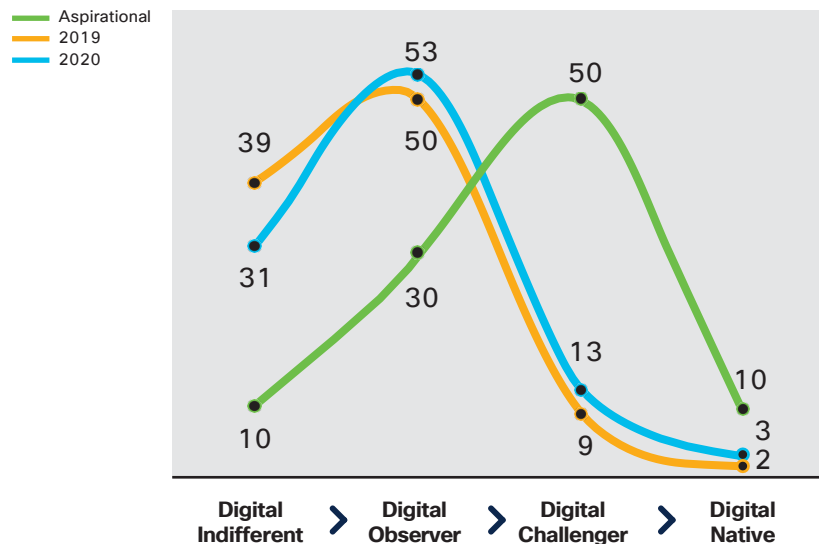
# Driving growth and improving customer experiences are top priorities driving digitalization

## Top Digitalization Priorities

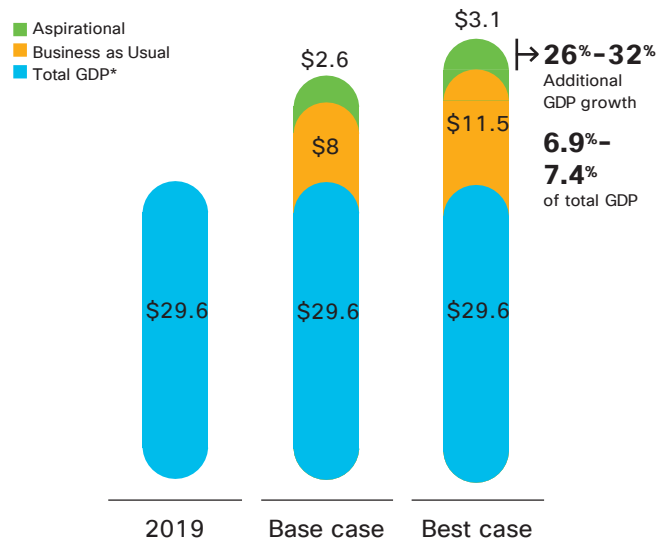


# Digitalization of SMBs could add as much as US\$3.1 Trillion to Asia Pacific's GDP by 2024

Percentage of SMBs in the Four Stages of Digital Maturity

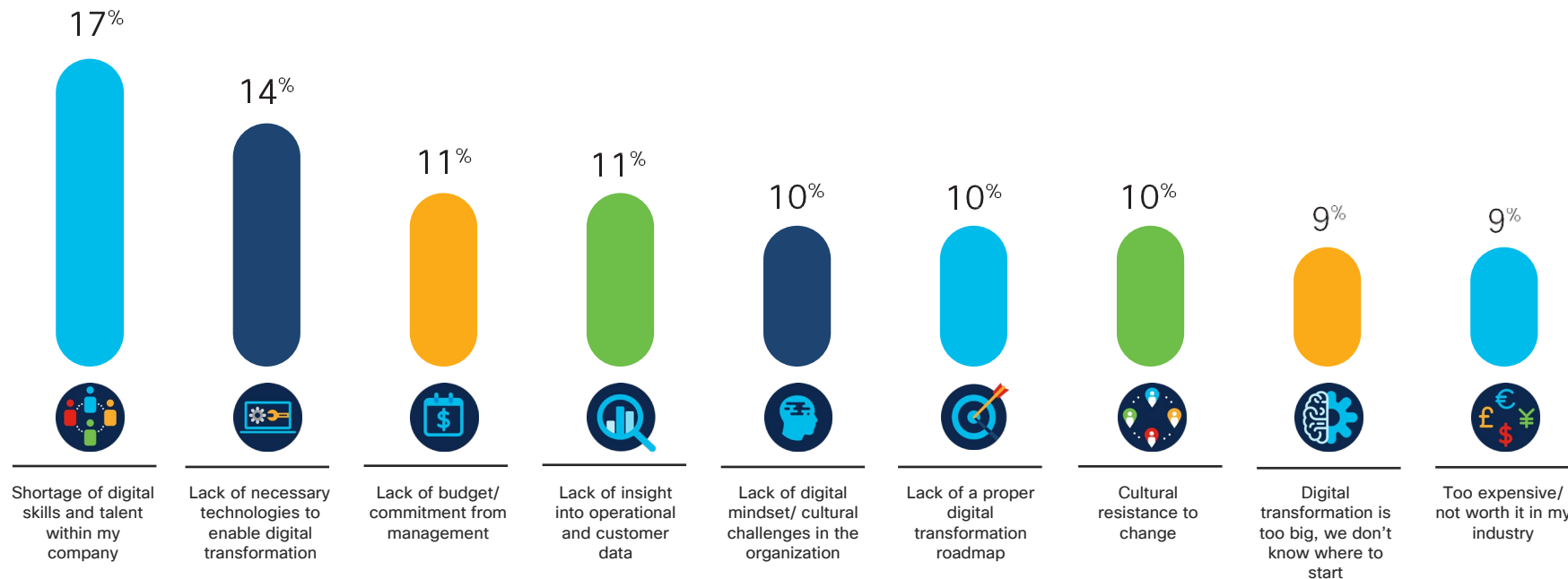


Cumulative GDP from Shifting SMBs to Aspirational Curve (US\$T)



# Shortage of Skills and Technology Are Top Digital Transformation Challenges

What is your top challenge in digital transformation?



# SMBs Seek the Right Partners in Their Journey

## Top Partner Preferences

53%

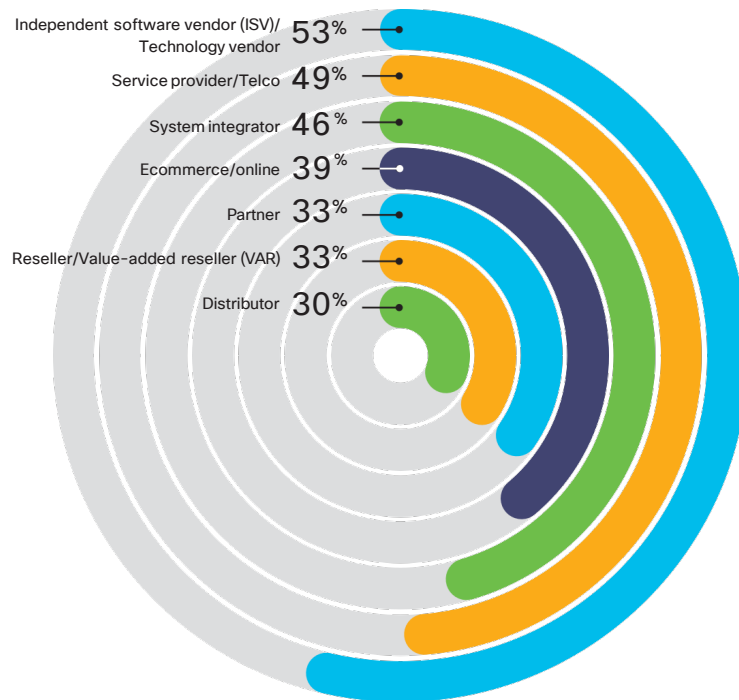
of Asia Pacific SMBs prefer to partner with ISVs when looking at digitalization solutions. Almost half (49%) of SMBs prefer service providers/telcos, and 46% system integrators.

## Information Sources for Digitalization Investments

52%

of Asia Pacific SMBs consider recommendations from industry advisors and analysis as the most relevant source of information for their technology investments, followed by attending technology vendor events (50%).

## Sources of Information for Technology Investments



# Why Cisco?

Cisco will help Partners capture their share of this massive opportunity with:



New Cisco Designed Portfolio



Customer focused demand generation



Increased Investment in Partner Programs, incentives and rewards

Cisco is Committed to Small Business Success





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# SMB's Digitization for New Normal

**Aseem Javed**

ASEAN Small Business Architecture Lead

# Cisco Designed enables work flexibility without compromise

**Yesterday many SMBs were relying on free-ware  
Today businesses owners must look beyond temporary solutions**

Today



Tomorrow





## Connect

Cisco Business  
Portfolio  
Meraki/Meraki Go\*  
Catalyst 1K  
Aironet



## Compute

Hyperflex Edge  
UCS  
Intersight



## Collaborate

Webex  
Hand/Headsets  
Video Endpoints



## Secure

Duo  
Umbrella  
AnyConnect  
ASA/Firepower  
AMP

Products and Services Designed and Curated for Small Businesses



# Cisco Designed: Solving TOP 5 IT challenges



## Work from home

Meet and collaborate with employees and customers securely



## Cybercrime Protection

Safeguard from identity theft, hackers, and Internet attacks



## Always-on Business

Easy installation and reliable IT services using cloud technology



## Workplace Monitoring

Safe social distancing and real-time activity monitoring



## Future of New Office

Improve productivity and security at shared physical workspaces

# Work from Home Solutions



“ Privacy is a fundamental human right, and we need security and transparency to protect it.”

**Chuck Robbins**

Chairman and CEO, Cisco

February 7, 2019

## Three Security Principles: Privacy, Security and Transparency

1

Committed to the **privacy** of your data

2

Secure **by design** and by default

3

**Transparent** about security



# Cisco Webex® Meetings

## The #1 Web conferencing platform in the world

- Easy to use
- Strong security and privacy
- Video-first experience
- Anyone can join from any device
- Easily share content
- Record meetings
- Integrates with your apps



# Comprehensive Portfolio:

Video Endpoints make the experience more immersive

## Collaboration Room Video



Webex Room 55



Webex Room 55D



Webex Room 70S G2



Webex Room 70D G2



Webex Room Panorama

## Co-Creation



Webex Board 55S



Webex Board 70S



Webex Board 85S

## In-Room Sharing



Webex Share

## Collaboration Desktop Video



Cisco IP Phone 8845 and 8865



Webex DX80



Webex Desk Pro

## Collaboration Room Kits



Webex Room Kit Mini  
Webex Room USB



Webex Room Kit



Webex Room Kit Plus



Webex Room Kit Pro

## Headsets



Cisco Headset 500 Series and/or its affiliates reserved.  
Cisco Headset 700 Series

## Desktop Voice



Cisco IP Phone 6800, 7800, and 8800 Series

## Wireless Voice



Cisco IP Phone 6825 DECT

## Conference Audio



Cisco IP Conference Phones 7832, 8832

# Don't Skimp on Security

# Telework is an Opportunity for Hackers

“ Hackers have hit 241 countries and territories with phishing and other scams.”

-Business Insider, April 2020

“ Official networks are supposed to be safe. But once you have even one participant joining a meeting from a home laptop, cyber defense suddenly has a weak spot.”

-Euronews, April 2020



“ 500,000 emails, 300,000 URL & 200,000 enclosures have been identified as Malicious in the first week of April in France.”

-ZDNET, April 2020

“ Teleworking is an opportunity for Hackers as million of workers are now more exposed to attacks. Using unknown PC's, personal devices, which are less secure than enrolled enterprise devices”

-ZDNET, April 2020

# Keep Your Workplace Safe

4,000

Daily  
attacks

43%

Target small  
business

62%

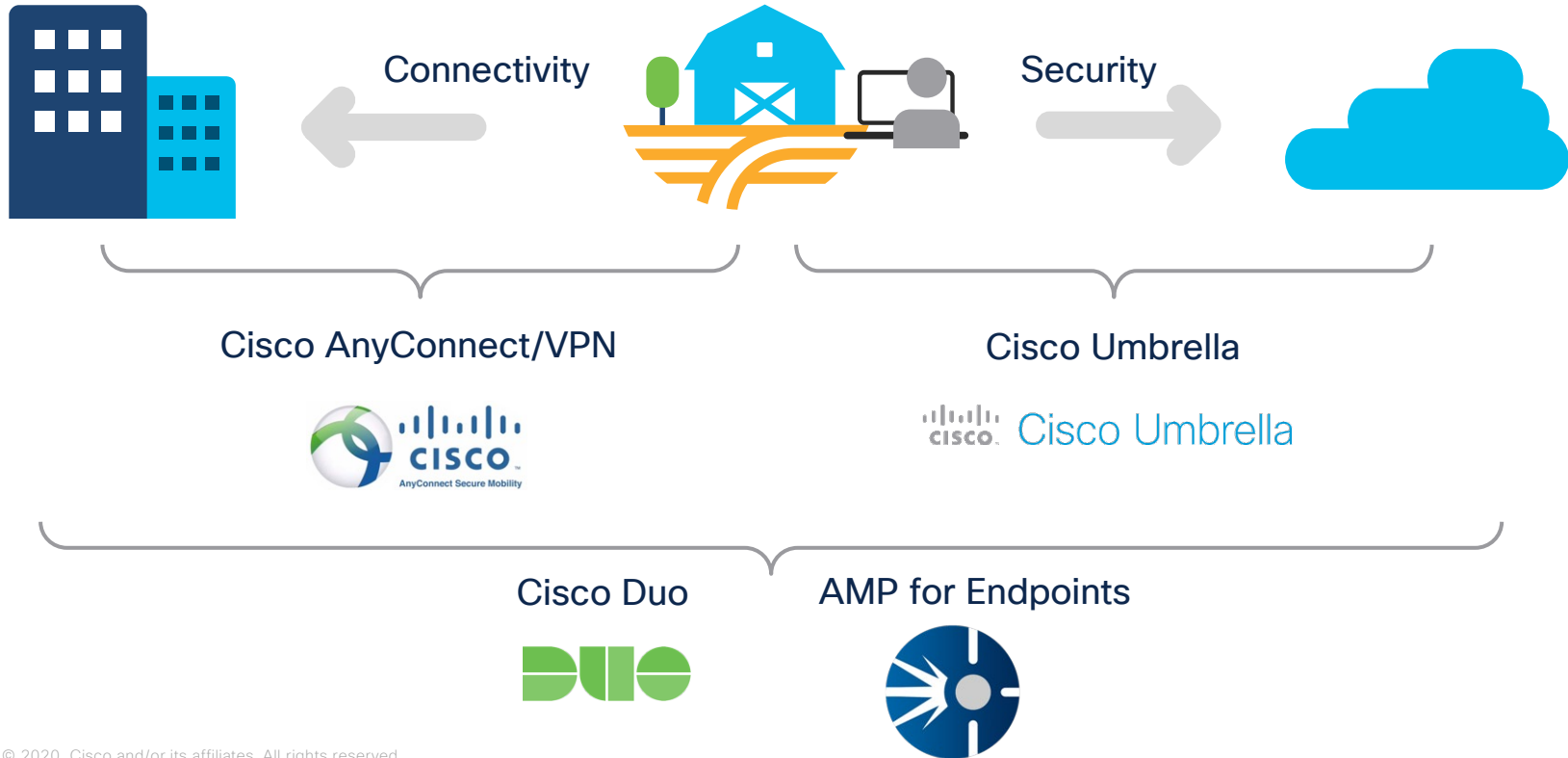
Reported  
breaches

You can't afford to overlook security when setting up remote workspaces. Look for security solutions that:

- Provide secure network access no matter what device people are using
- Protect your sensitive data by verifying the identity of users, devices, and applications
- Defend against threats with cloud-delivered security
- Detect and block cyberattacks



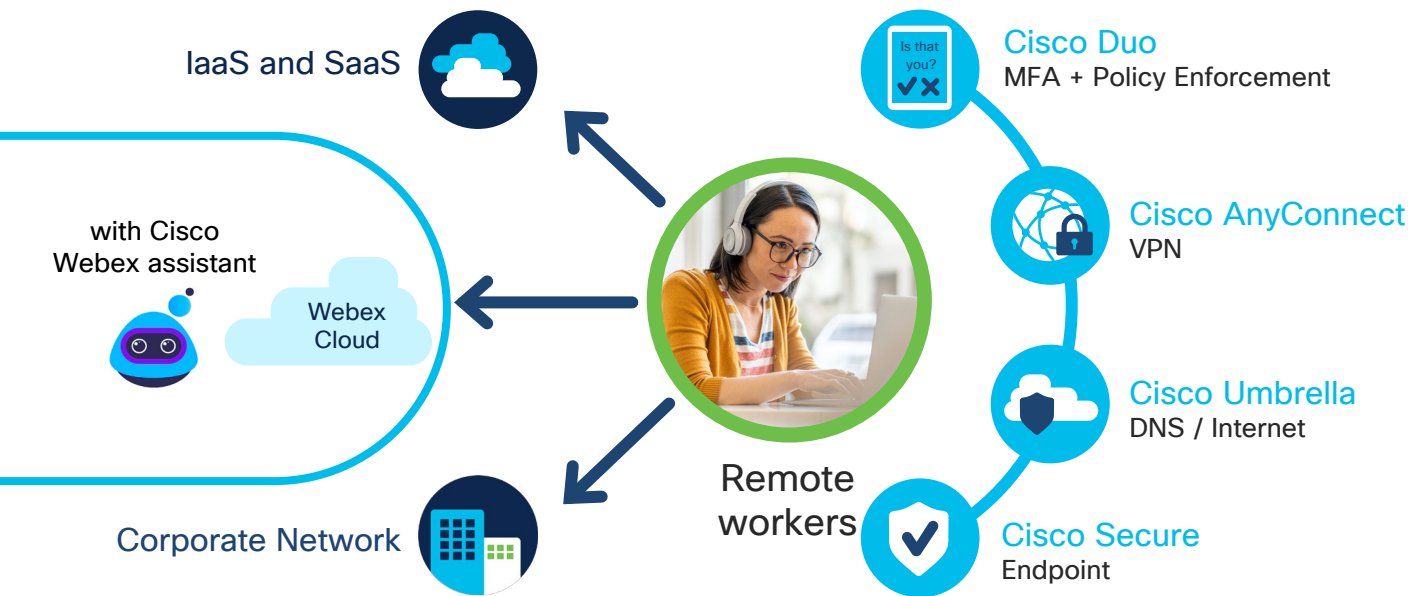
# Secure Remote Worker Solution



# Offers

# The change from single Cloud to Multi-Cloud, Cisco Webex, Cisco Secure

Give your business the flexibility to thrive



## Cisco Webex meetings offers

- Great promotion price for SMB
- **Single sign-on**
- **MS exchange and Active Directory sync**
- **Recording** transcriptions

## Cisco Secure Cloud security offers

- Great promotion price for SMB
- **Single sign-on to Webex**
- Granular web application controls

Primary targeted partners: #1 Cloud SaaS partners, #2 MSP/MSSP/ISP partners

# Key Takeaways

# Questions to Ask Yourself



Is my current WFH service secure?

How are you communicating with your teams and customers?

Are you able to provision and monitor your network?

Are you securing enough remote access?

Are you ready to reopen your offices safely?

# Seven steps to becoming a SMB Digital Challenger

- 1 Develop a three year digital technology roadmap
- 2 Prioritize the critical business processes to automate
- 3 Evaluate and right-size the technologies to invest in
- 4 Invest in digital talent and skills
- 5 Find the right technology partner for your journey
- 6 Keep up with industry trends and best practices
- 7 Simplify, start small, learn and scale

