BOB Conference 2019

Ken Lamneck
President & CEO, Insight

Agenda

- Insight's journey
- View of the market

The Insight way

We build meaningful connections to help businesses **run smarter**.

Hunger
We're driven by a deep curiosity — to learn, to explore and to grow. Where others assume, we question, and where others stop, we're just getting started.

Heart
We don't think of ourselves as individuals but as teammates. We take care of each other, our clients and our communities. We believe in each other and take pride in what we can collectively achieve.

Harmony
We're different in skill sets, perspectives and backgrounds but united by a common goal. We welcome uniqueness and all points of view as we work together to make transformation happen.

Financial imperatives
- Grow business 2% faster than the market every year
- Expand gross margin 20 basis points every year.
- Improve productivity and efficiency by 7% every year.

In the near term, earn 3.5 cents from every $1 of sales.

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2019 business goals

Earn client loyalty.
Create meaningful connections that drive value for both clients and partners.

Lead with Insight Intelligent Technology Solutions™
Deliver integrated products and services through our four solution areas to drive business outcomes.

Drive profitable growth.
Demonstrate Hunger through the pursuit of operational excellence and delivery of high-value solutions.

Champion people, leadership and culture.
Create growth opportunities, invest in teammates and live our values of Hunger, Heart and Harmony to become an employer of choice.

Solution areas
- **Digital Innovation**
- **Cloud + Data Center Transformation**
- **Connected Workforce**
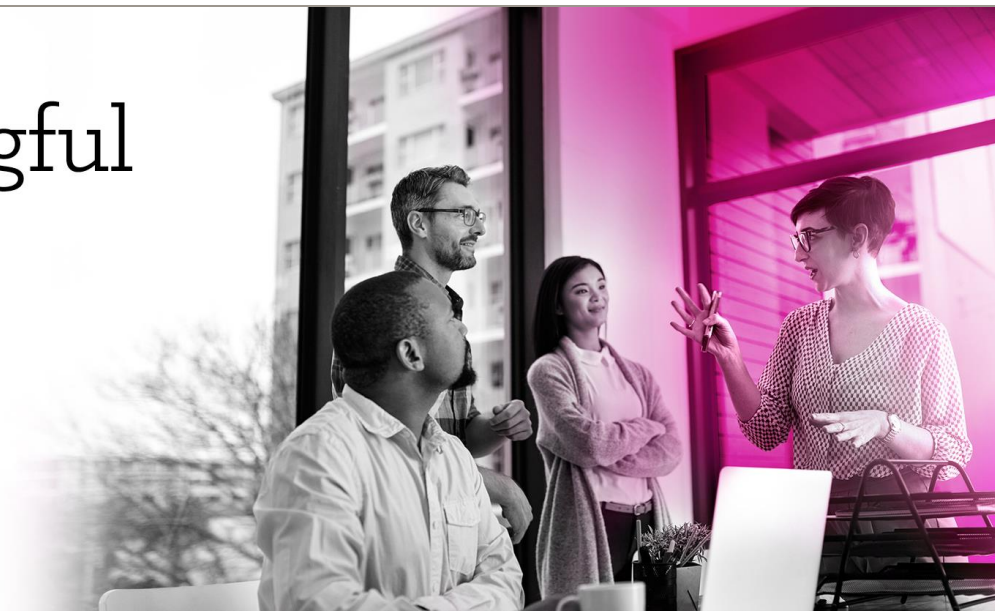- **Supply Chain Optimization**

Leadership Commitments
- Create clarity.
- Inspire people.
- Demonstrate thought leadership.
- Deliver results.

✥ Insight.

The Insight way

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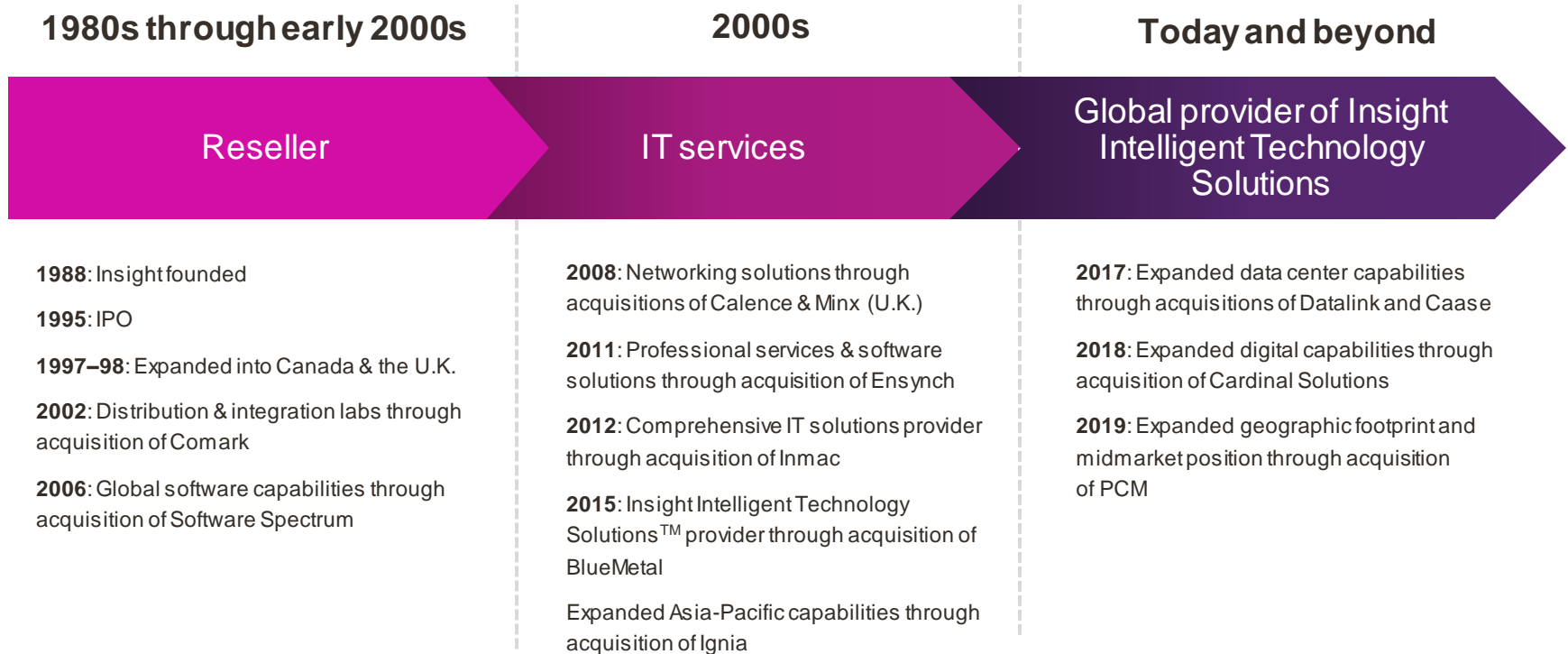Demonstrate Hunger through the pursuit of operational excellence and delivery of high-value solutions.

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Insight at a glance

Profile	Results	Services	Talent
30+ years Evolving in dynamic industry	**$9.2 Billion** Performance **6.6%** 5 YR CAGR	**18%** Insight Services Sales 5 YR CAGR	**11,000+** Teammates worldwide
19+ Countries where clients are served	**$237 Million** Adjusted EFO **12%** 5 YR CAGR	**46%** 2018 Services GP to Total GP	**8,000+** Client-facing teammates
No. 417 2019 Fortune 500		**18%** 2018 Cloud GP to Total GP	**4,500+** Technical resources

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Journey to an intelligent technology solutions provider

1980s through early 2000s	**2000s**	**Today and beyond**
Reseller	IT services	Global provider of Insight Intelligent Technology Solutions

1988: Insight founded

1995: IPO

1997–98: Expanded into Canada & the U.K.

2002: Distribution & integration labs through acquisition of Comark

2006: Global software capabilities through acquisition of Software Spectrum

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2008: Networking solutions through acquisitions of Calence & Minx (U.K.)

2011: Professional services & software solutions through acquisition of Ensynch

2012: Comprehensive IT solutions provider through acquisition of Inmac

2015: Insight Intelligent Technology Solutions™ provider through acquisition of BlueMetal

Expanded Asia-Pacific capabilities through acquisition of Ignia

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2017: Expanded data center capabilities through acquisitions of Datalink and Caase

2018: Expanded digital capabilities through acquisition of Cardinal Solutions

2019: Expanded geographic footprint and midmarket position through acquisition of PCM

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Track record of innovation

1980s through early 2000s   **2000s**   **Today and beyond**

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1988: Insight founded

| 1988 | 1995 | 1997 | 2002 | 2006 | 2008 | 2011 | 2012 | 2015 | 2017 | 2018 | 2019 |

Global scale/reach sets us apart

Footprint represents 70% of global IT spending

25 sites

52 sites

10 sites
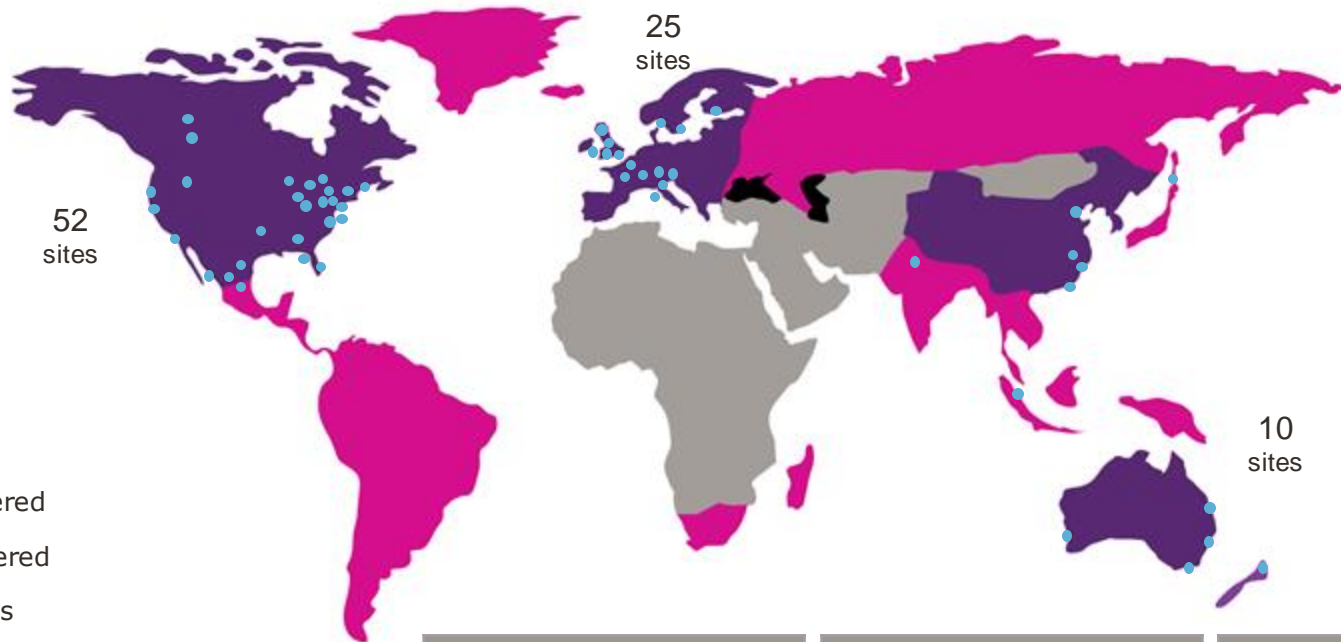
- ■ Insight-delivered
- ■ Partner-delivered
- ● Insight offices

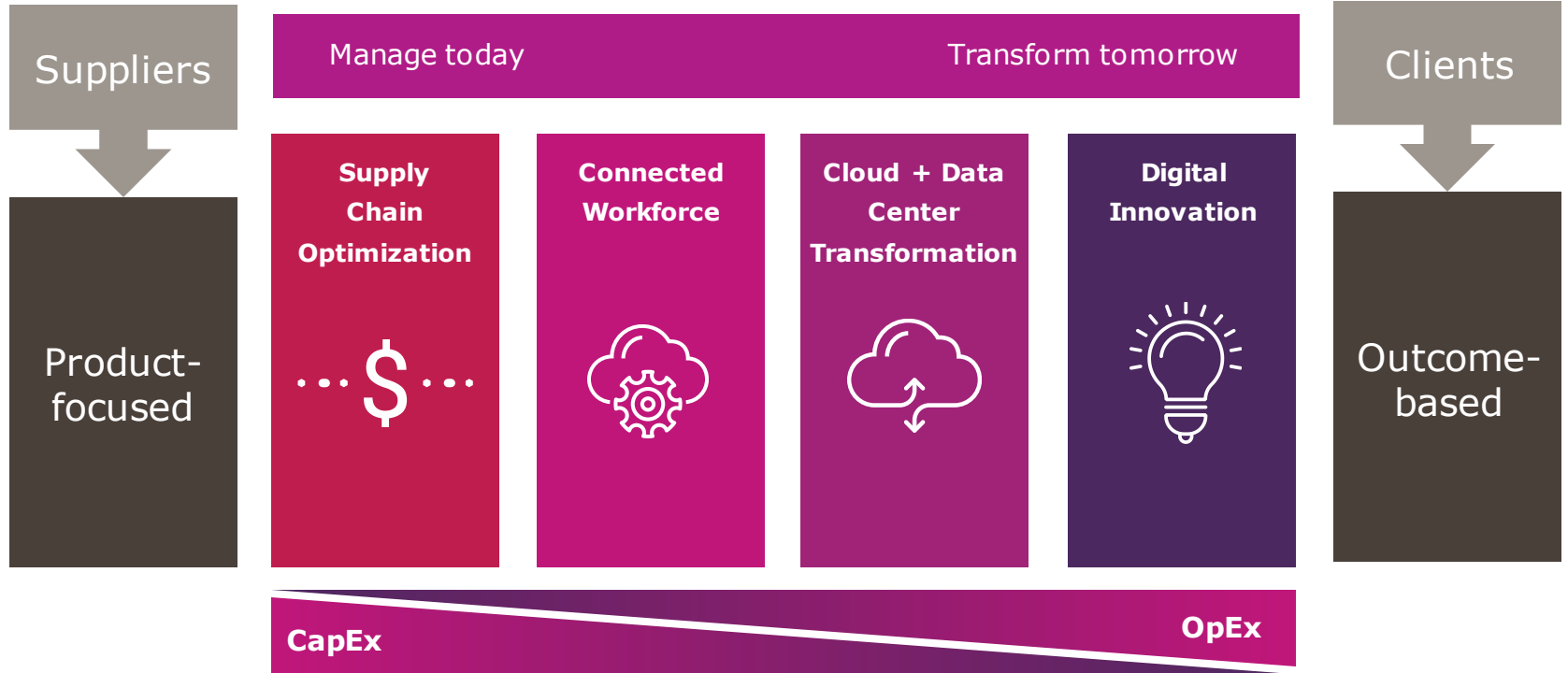| Multicurrency support	Multilingual support	Web portal
14 Currencies	14 Languages	Available in 7 languages

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Diverse and loyal client base presents long-term growth opportunity

- Long-standing and "sticky" client relationships
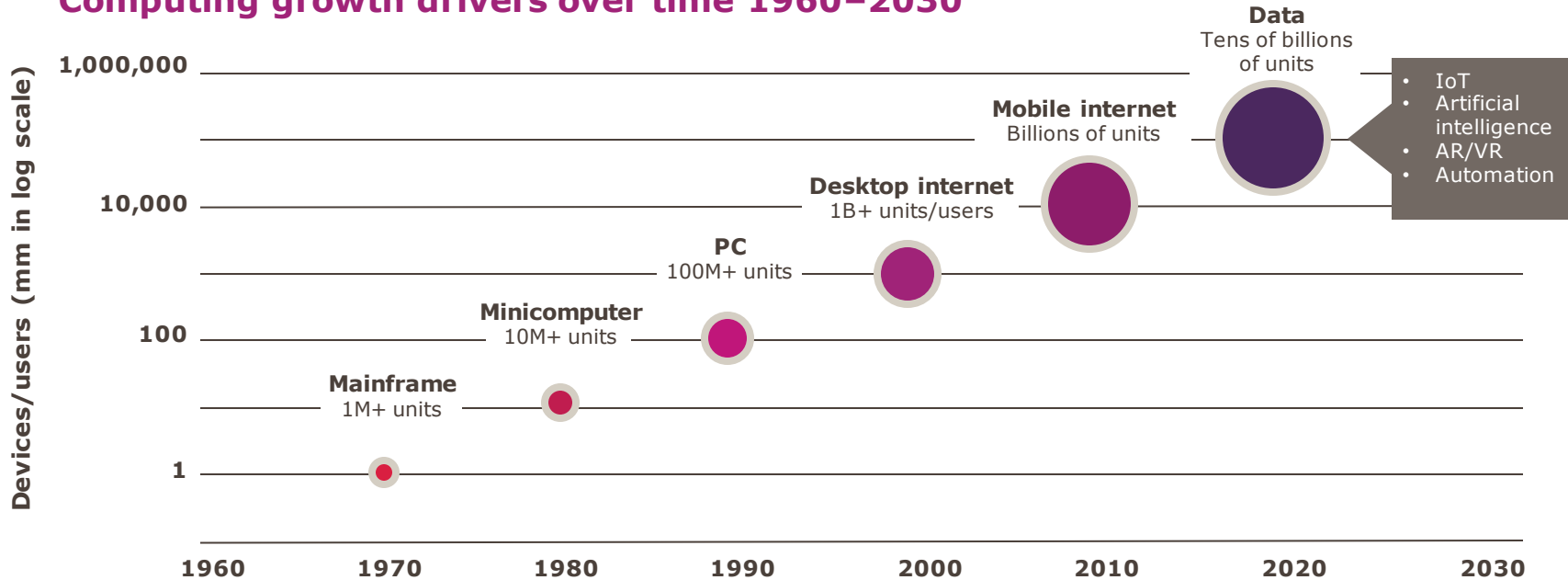- Opportunity to accelerate growth in commercial accounts

Pie chart:
- Global 28%
- Enterprise 36%
- Commercial 23%
- Public 13%
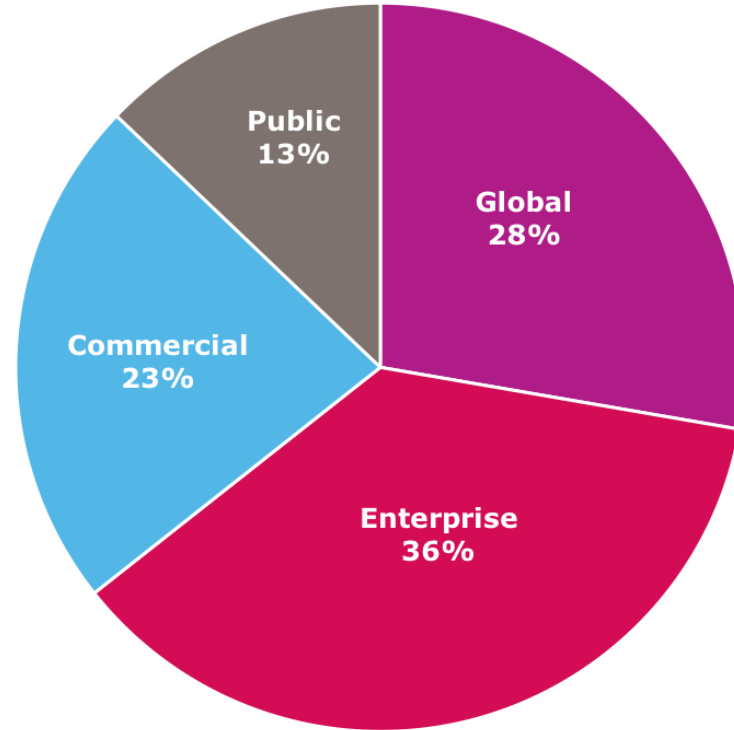
Our solutions align to industry trends and drive business outcomes for our clients

Suppliers	Manage today			Transform tomorrow	Clients
Product-focused	Supply Chain Optimization	Connected Workforce	Cloud + Data Center Transformation	Digital Innovation	Outcome-based

CapEx → **OpEx**

We're entering the next computing cycle, which is centered on data…

Computing growth drivers over time 1960–2030

Devices/users (mm in log scale)

- 1,000,000
- 10,000
- 100
- 1

Data
Tens of billions of units

Mobile internet
Billions of units

Desktop internet
1B+ units/users

PC
100M+ units

Minicomputer
10M+ units

Mainframe
1M+ units

- IoT
- Artificial intelligence
- AR/VR
- Automation

1960   1970   1980   1990   2000   2010   2020   2030

Source: 2018 Morgan Stanley Research

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Moving focus from data centers to centers of data

Private cloud

Public cloud
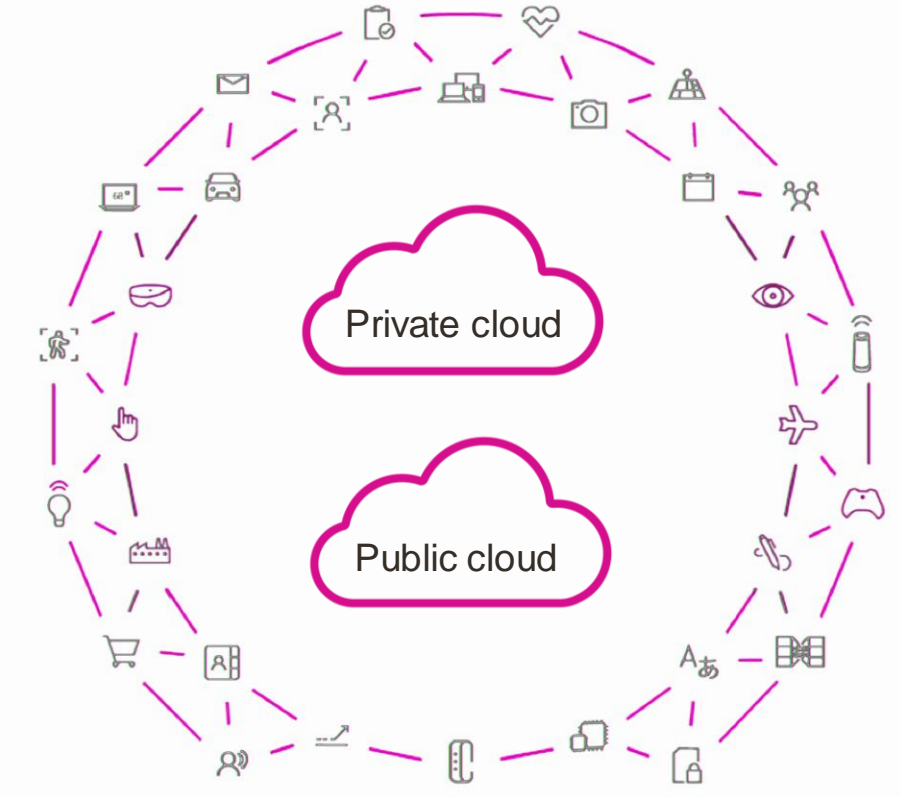
Intelligent edge

The shift in IT spending from noncloud to cloud
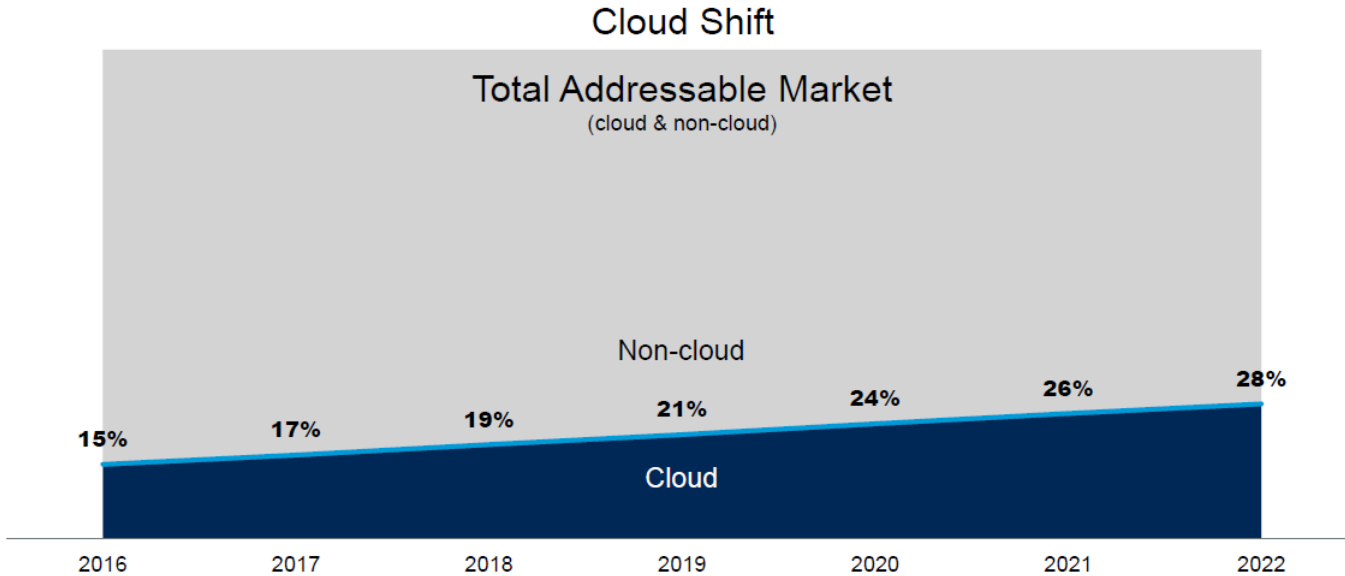
Cloud Shift

Total Addressable Market
(cloud & non-cloud)

Non-cloud

15%   17%   19%   21%   24%   26%   28%
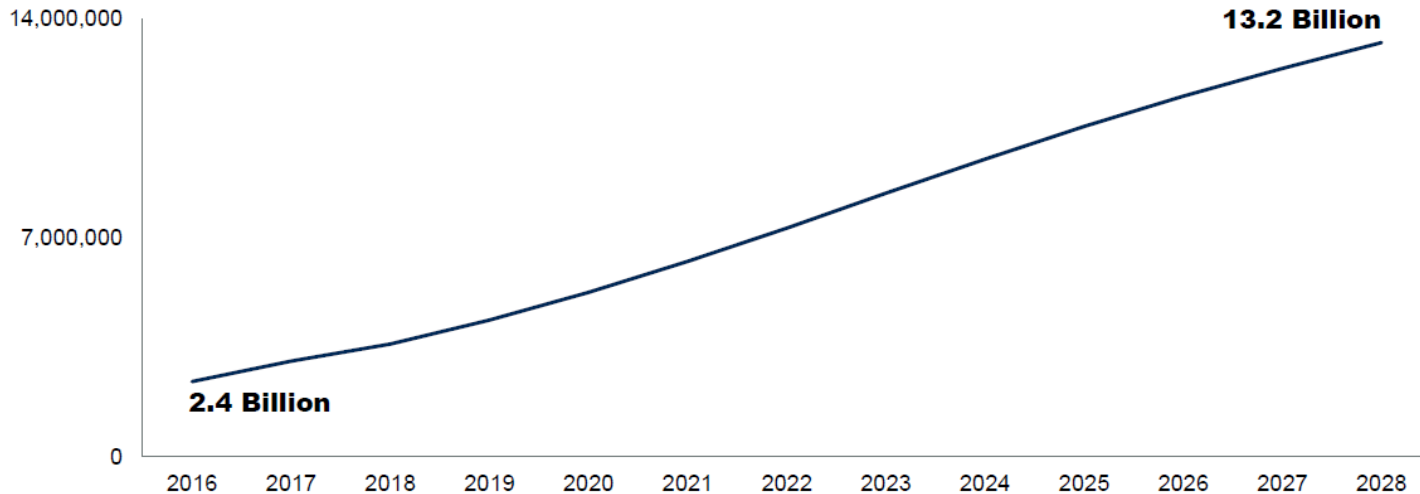
Cloud

2016   2017   2018   2019   2020   2021   2022

Gartner

Source: Gartner, Tech Growth and Innovation Conference, How Global Cloud Adoption Signals Future Opportunities for Product Managers, Ed Anderson and John-David Lovelock, June 3 – 5, 2019

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IoT devices are growing

~1 billion new IoT devices are being added each year in enterprise environments.

14,000,000

13.2 Billion

7,000,000

2.4 Billion

0

2016 2017 2018 2019 2020 2021 2022 2023 2024 2025 2026 2027 2028

Source: Gartner, IoT Forecast (Apr 2019)
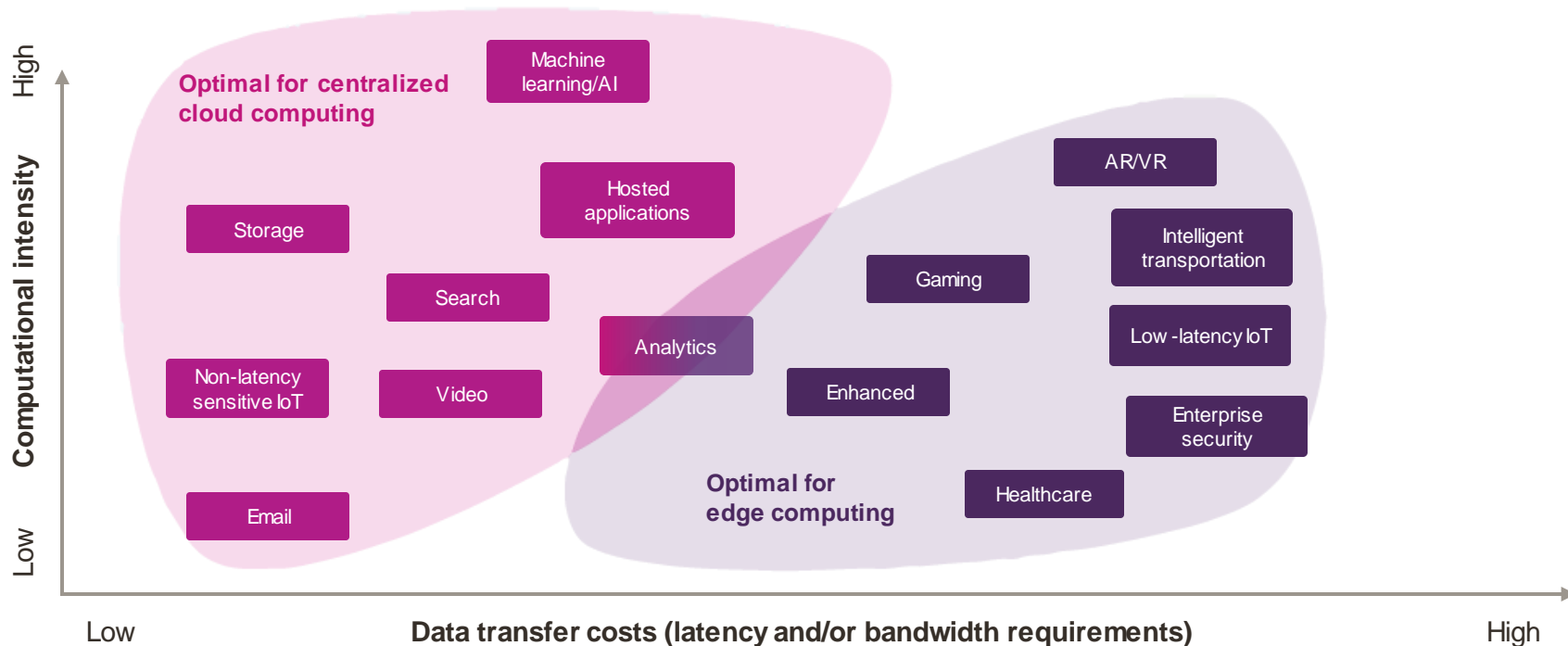
Source: Gartner, Tech Growth and Innovation Conference, Cloud and Edge —Partners in Next-Generation Solutions Ed Anderson, June 3 – 5, 2019

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Exhibit 19: Some workloads will continue to be most effectively run in the public cloud; some are more suitable for edge computing

Workloads for public cloud vs. edge computing

Optimal for centralized cloud computing

- Machine learning/AI
- Storage
- Hosted applications
- Search
- Non-latency sensitive IoT
- Video
- Analytics
- Email

Optimal for edge computing

- AR/VR
- Intelligent transportation
- Gaming
- Low-latency IoT
- Enhanced
- Enterprise security
- Healthcare

Computational intensity (High / Low)

Data transfer costs (latency and/or bandwidth requirements) (Low / High)

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Strategic planning assumptions

By 2022, 75% of enterprise-generated data will be created and processed outside the data center or cloud, up from 40% today.

By 2021, 40% of large enterprises will be integrating edge computing principles into their IT projects, up from less than 1% in 2017.
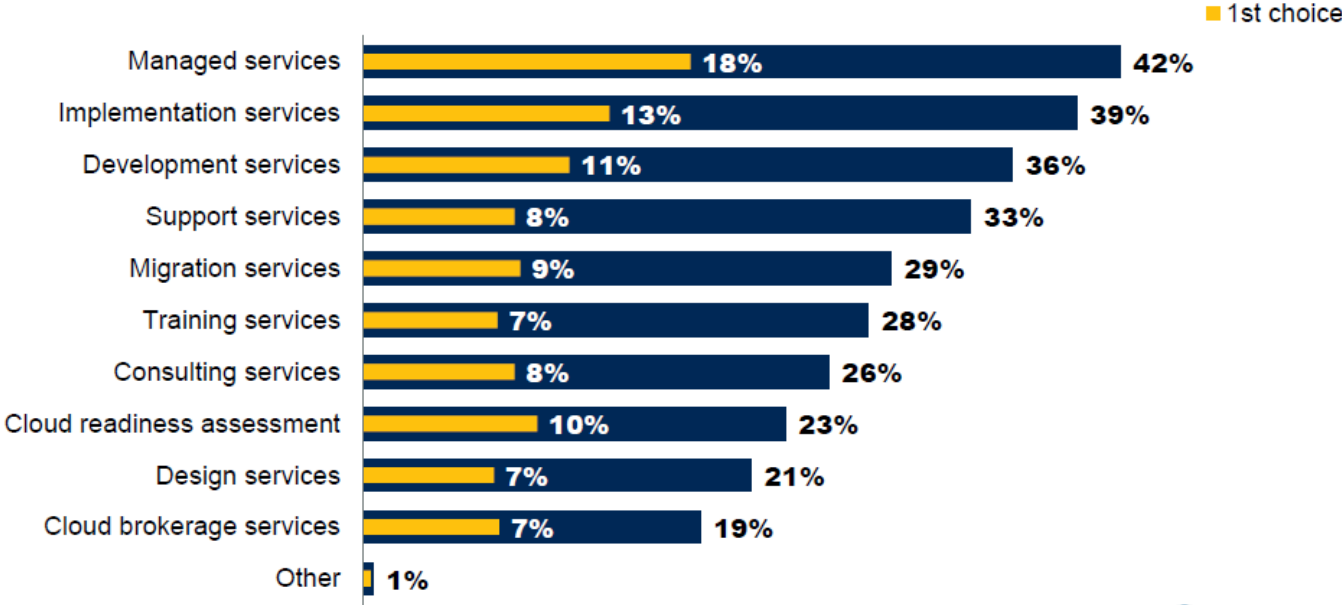
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Managed services lead in cloud IT services

In which 3 cloud-related IT services is your organization investing the MOST?
Percentage of Respondents, Sum of Top 3 Ranked

■ 1st choice

Service	1st choice	Total
Managed services	18%	42%
Implementation services	13%	39%
Development services	11%	36%
Support services	8%	33%
Migration services	9%	29%
Training services	7%	28%
Consulting services	8%	26%
Cloud readiness assessment	10%	23%
Design services	7%	21%
Cloud brokerage services	7%	19%
Other	1%	

Gartner.

This new business model for solution providers requires:

- New offer types to client

- New organizational capabilities & skills

- New consumption models

- New go-to-market models (LAER)

- Sophisticated IT systems for

  frictionless e-procurement

What's changing

What's hot?	What's not?
Outcome-based selling	RFPs
Client success teams	SLA-only focus
OpEx	CapEx
Lines of business selling	Only selling to IT
Verticalization	Geographic
Land, Adopt, Expand, Renew (LAER)	Big transactions
Self-service/self-healing	High-touch white glove

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Thank you