TeamViewer

Anyone. Anything.
Anywhere. Anytime.

The Connectivity Platform

Product & Sales Demo Day – 17 December 2019

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Insights in Sales

Oliver Steil, CEO

1 **Overview:** Diverse Go-To-Market Approach Driving Exceptional Performance

2 **Inside Sales:** Highly Educated Global Sales Teams Using Cutting Edge Data To Drive Enormous Productivity

3 **Enterprise Sales:** Leveraging TeamViewer's Strengths To Expand And Win In New Segment

4 **Channel Sales:** Enabling Further Market Penetration Via Indirect Channels

Diversified Strategy To Enable Broad Customer Reach

INSIDE SALES

- Very productive, high velocity model
- Highly educated and incentivised salesforce
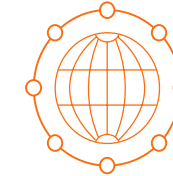- Data-driven approach, leveraging vast customer base

#132 FTEs

ENTERPRISE SALES

- Named account model
- Strong existing foundation to drive growth
  - Large number of Enterprise customers
  - Strength of brand
  - Strong Enterprise product

#53 FTEs

CHANNEL SALES

- Channel strategy broadening reach
  - Distributor/Reseller for local expertise and breadth
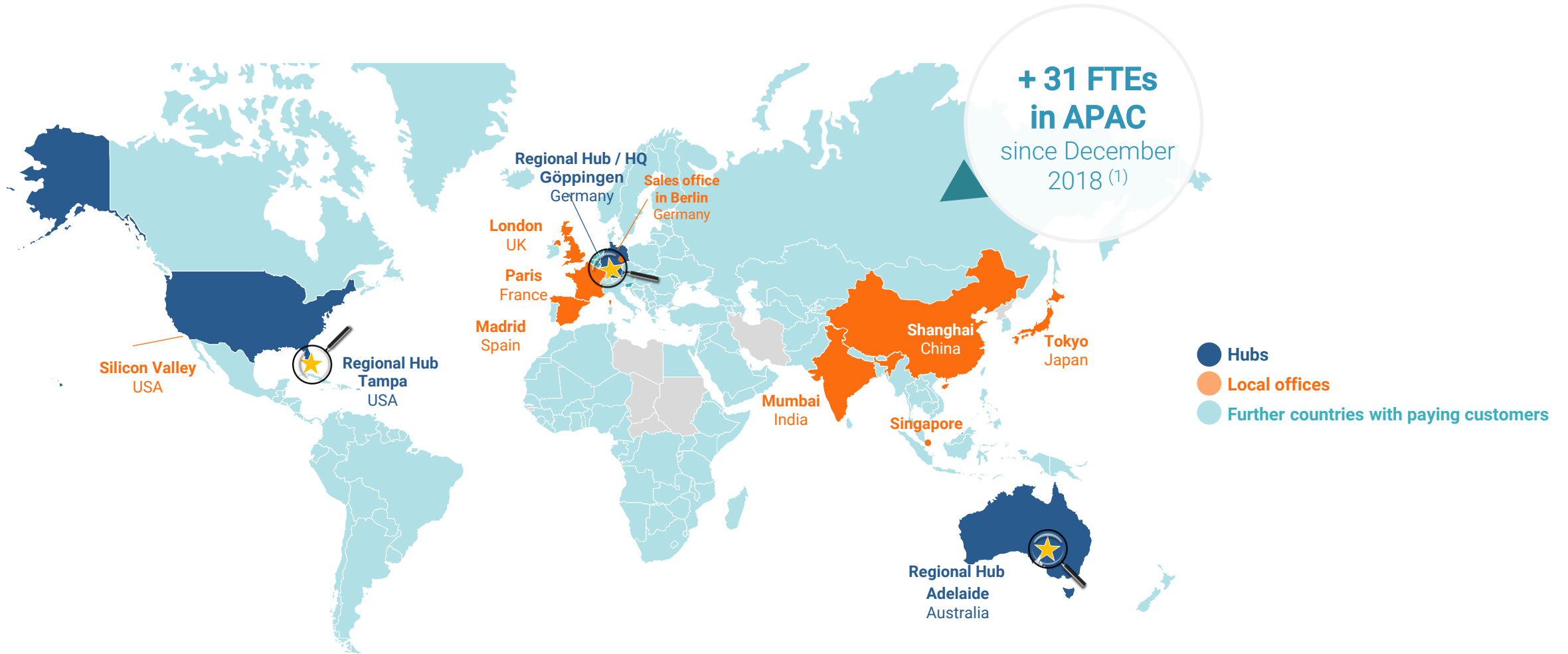 - System Integrators to target solutions for upper mid-market and Enterprise customers

#30 FTES

Source: Company information, Sales FTEs as of October 2019

Focused Sales Strategy To Win In Different Markets

+ 31 FTEs in APAC since December 2018 [1]

Regional Hub / HQ
Göppingen
Germany

Sales office in Berlin
Germany

London
UK

Paris
France

Madrid
Spain

Silicon Valley
USA

Regional Hub Tampa
USA

Shanghai
China

Tokyo
Japan

Mumbai
India

Singapore

Regional Hub Adelaide
Australia

- **Hubs**
- **Local offices**
- **Further countries with paying customers**

Source: Company information
1. Sales FTEs added in APAC between December 2018 and May 2019

Inside Sales Team – Highly Productive, Educated And Engaged

✓ Highly productive

- Complete product suite from TeamViewer Core to IoT
- Focus on retention
- Leveraging freed-up resources following the SaaS transition to drive growth

✓ Highly educated

- >70% university educated
- Frequent live coaching and skill trainings

✓ Engaged

- Pipeline ownership
- Relationship building through sales cycle

✓ Diverse

- 35 nationalities speaking over 25 languages
- More than one third of workforce female

✓ Performance focused

- Individual targets and daily tracking
- Frequent reviews and 1:1s
- ~25% variable pay

Leveraging Our Strengths To Win In Enterprise

Strong Enterprise Sales Organisation Poised For Future Growth

>50%
Of Fortune 500 companies
already TeamViewer customers [1]

+60%
Year-on-year growth
in large contracts [2]

Strong Existing Foundation

✓ **Well-known, trusted brand**

✓ **Existing customer base** for basic product providing huge up-sell and cross-sell opportunity

✓ **Strong integration and good relationships** with leading platforms

Leading Product

✓ **New products** with enterprise-grade features

✓ **Native cloud technology** providing pricing advantage

✓ **Enterprise use cases** to further drive growth

Leading Team

✓ **Experienced and focused** enterprise account executives

✓ **Close to customers** through local on-the-ground presence

✓ **In-market and vertical expertise**

✓ **Industry events** to educate and network with other leading companies

Source: Company information
1. Companies which have had at least one invoice with TeamViewer as of June 2019
2. Growth of number of customers with annual contract value above €10k (any product) Year-over-year Q3 19 vs. Q3 18

Strong Partnerships Delivering Low Cost Penetration

Partnership Structure

EMEA	AMERICAS	APAC

Distributors
(e.g. Ingram, Prianto, Lifeboat, Pax8, Ingram, Synnex)

Resellers & System Integrators
(e.g. Atea, Bechtle, Software One, Softline, Insight, LAC, Sinata)

+ ~380	+ ~1,100	+ ~830
registered partners as of June 2019	registered partners as of June 2019	registered partners as of June 2019

- ✓ **Two-tier model** in all geographic markets
- ✓ **Leveraging distributors** for **local expertise and breadth**
- ✓ **Leveraging System Integrators** for solutions building and upper mid-market & enterprise access
- ✓ **Roll-out of Channel program 2.0** to enhance **focus on value business**

Source: Company information

TeamViewer Salesforce With Highly Effective Set-Up To Enable Further Growth

1
Overview

Diversified Go-to-market approach driving exceptional performance

2
Inside Sales

Highly productive Inside Sales organisation underpinned by data-driven approach

3
Enterprise Sales

New and dedicated Enterprise Sales team with substantial growth potential

4
Channel Sales

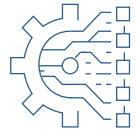**Further market penetration at high end** via indirect **Channel Sales**

Remote Connectivity Has Become Business Critical

DIGITAL TRANSFORMATION

$665bn

Digital transformation market size by 2023

IOT & AI

€186bn

Total IoT endpoint hardware spending

FUTURE OF WORK

>50%

Employees globally work outside main office headquarters at least 2.5 days a week

ROBOTICS & AUTOMATION

$210bn

Worldwide spending on robotics systems & drones in 2022

DEVICE & APPLICATION PROLIFERATION

24

Average number of devices and connections per household in North America by 2022

CARBON FOOTPRINT REDUCTION

40%

EU's target to reduce greenhouse gas emissions by 2030 compared to 1990

Anyone   *Anything*   *Anywhere*   *Anytime*

Digital Transformation Enabling Businesses To Compete More Efficiently And Effectively

DIGITAL TRANSFORMATION

Why TeamViewer
Simplicity in connectivity allowing to interact from anywhere at anytime across devices

How you benefit
- Drawing from remote connectivity and remote collaboration expertise
- Strong focus on security gives confidence to your customers
- Partnering with system integrators to act as a catalyst

What is happening
Global digital transformation spend
€665 Bn by 2023

| WORKPLACE DIGITALISATION | DIGITALISATION OF CUSTOMER SUPPORT | REMOTE MAINTENANCE | … |

Source: Company information based on third-party market study, MarketsandMarkets

Internet Of Things And Artificial Intelligence Drive Device Connectivity

INTERNET OF THINGS & ARTIFICIAL INTELLIGENCE

Why TeamViewer

Connectivity enables the communication between IoT devices with high returns for customers
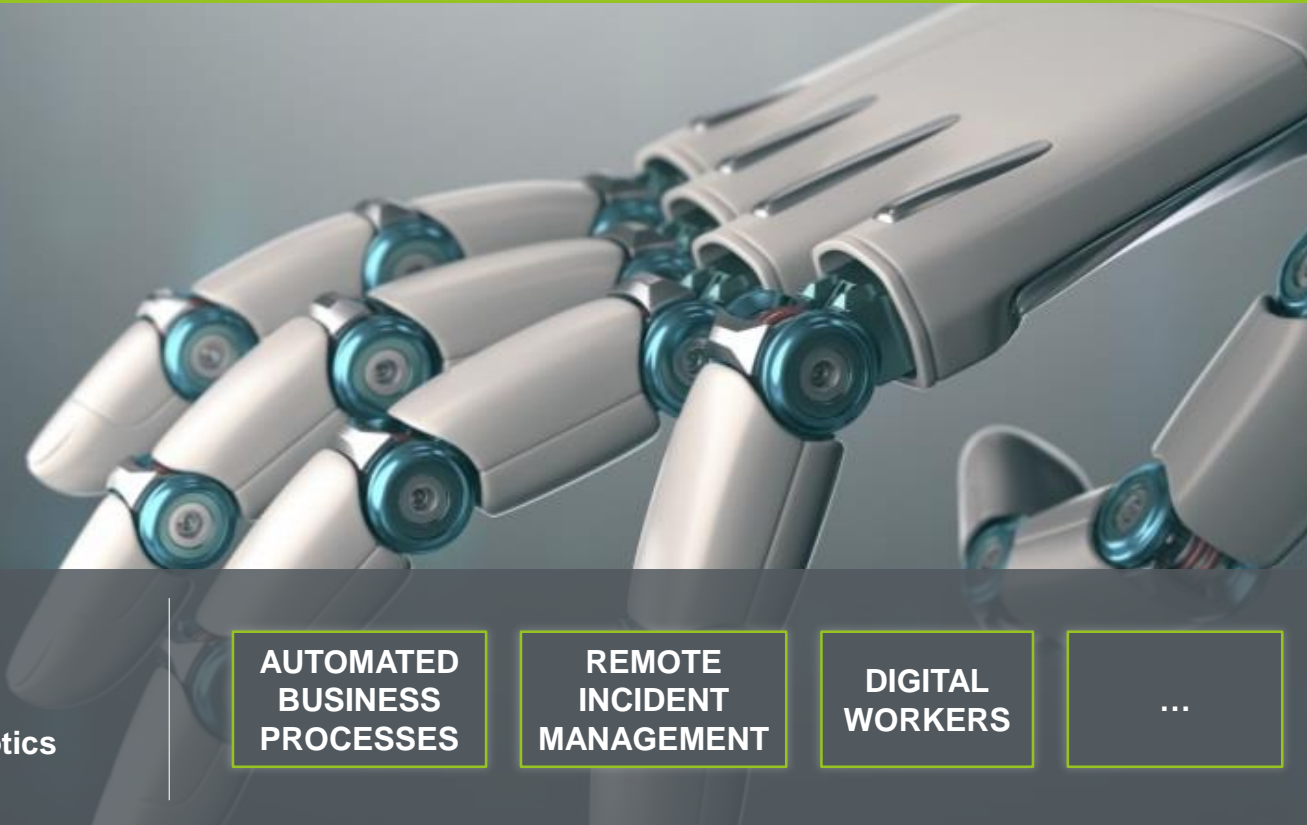
How you benefit

- Broad device coverage enables you to leverage this trend
- Easy-to-use and affordable solution with fast installation and mass deployment
- Focus on heterogeneous networks and interoperability

What is happening

€186 billion

IoT endpoint spending in 2023

| SMART FARMING | SMART CITY | INDUSTRIAL IOT | ... |

Deployment Of Robotics And Automation Beyond Classical Manufacturing

ROBOTICS & AUTOMATION

Why TeamViewer
Advanced remote control capabilities enable automation and incident management, reducing need for human presence
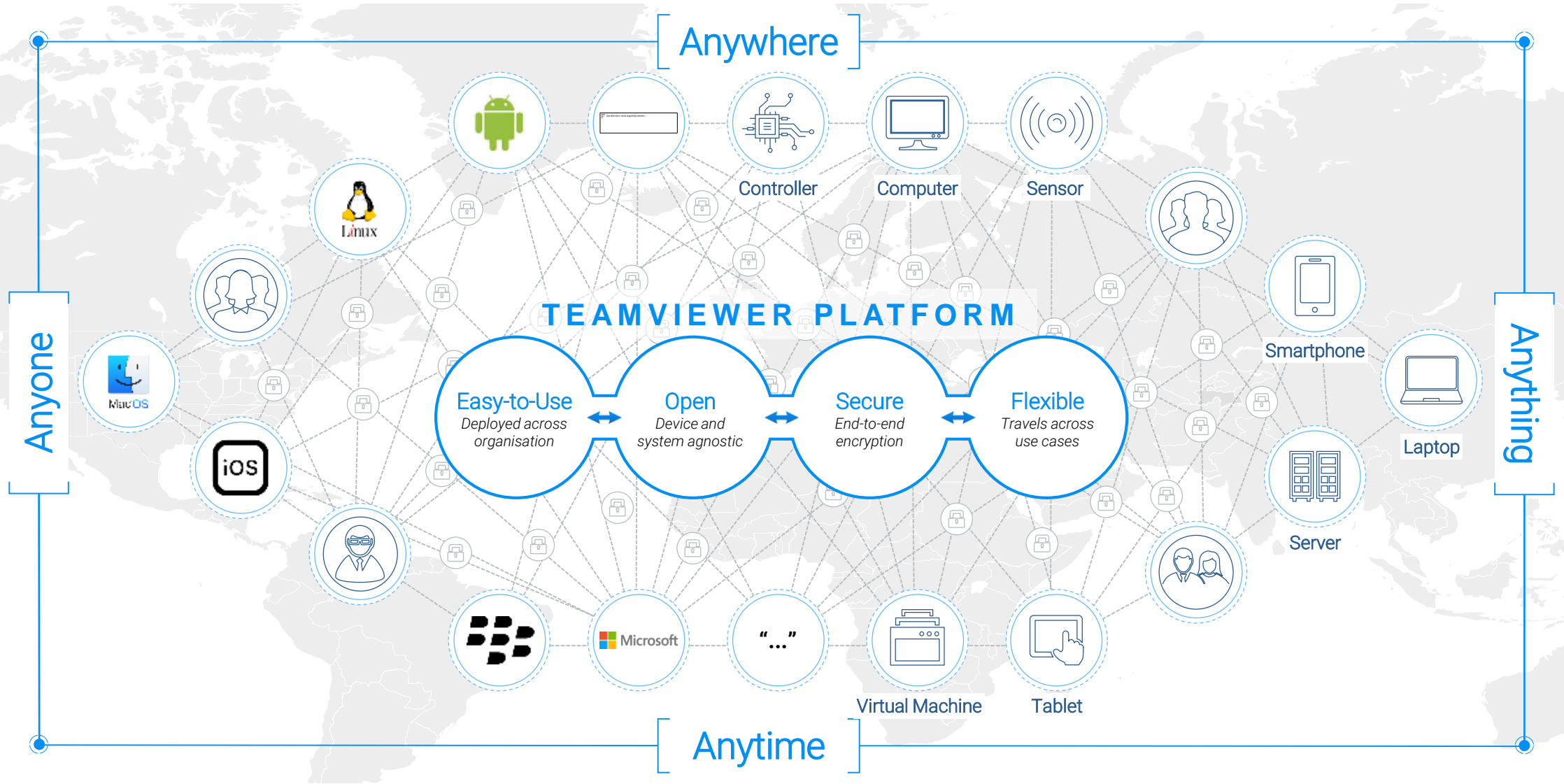
How you benefit
- Off-the-shelf functions to automate tasks or processes
- Leverage remote monitoring and control of devices with automated incident management

What is happening
$210 billion
Worldwide spending on robotics systems & drones in 2022

| AUTOMATED BUSINESS PROCESSES | REMOTE INCIDENT MANAGEMENT | DIGITAL WORKERS | ... |

We Deliver Business Connectivity...

Anywhere

Anyone

Anything

Anytime

Controller

Computer

Sensor

Smartphone

Laptop

Server

Virtual Machine

Tablet

TEAMVIEWER PLATFORM

Easy-to-Use
Deployed across organisation

Open
Device and system agnostic

Secure
End-to-end encryption

Flexible
Travels across use cases

Microsoft

"..."

... Based On A Modular And Highly Scalable Technology Stack.

Internal IT Support · **External Customer Support** · **Remote Work** · **Virtual Reality Support** · **IT Management** · **IoT / Connecting Devices**

Apps

servicenow	Microsoft Intune	salesforce	mobileiron	Custom Apps	...

Integration into...

Connectivity Services

TeamViewer Tensor	TeamViewer Internet of Things	TeamViewer Pilot	TeamViewer Remote Management	TeamViewer Remote Access	blizz TeamViewer

Security Layer

Connectivity Platform

Large and Rapid Network [1] *>1,000 routers*	**100% Cloud** *Massively scalable infrastructure*	**Zero** *knowledge-based principle*	**High Security Standard** *Two-factor authentication and end-to-end encryption*	**Reliable** *~99.9% uptime* [2]	**Low Latency** *Strong connection across high and low bandwidth*

Creating Significant Value For Your Organization

Cost Savings Driving ROI

"30% reduction in case resolution time for in-field service workers**"**

"Time required for remote authentication decreased from 15 minutes to **10 seconds"**

"Without TeamViewer, we would need about **10-15** agents to be on-call and ready**"**

"20% capacity increase for remote support team vs. competitor solutions**"**

"It saves us **$30k** in travel expenses per year**"**

"It literally saves us **thousands** of man hours a year travelling all over the country**"**

New Business Models Helping Revenues Grow

"Registers [...] cannot store data long-term. TeamViewer simplified register retrieval and **product evaluation management**.**"**

"If climate control fails, we could have **40k dead chickens** within one hour [...] Without TeamViewer, we would have to be on site**"**

"Increasing [...] **income by 20%** with the cattle behavioural mating recognition system [...]. TeamViewer allows breeders to check [their cattle]**"**

"Actually, TeamViewer is the reason **why we started this [IT management] business** in the first place.**"**

Powering A Global IT Helpdesk

IT support solution for an Austrian hardware manufacturer with a global footprint

TeamViewer Solution
- Solution for centralised internal IT support
- Scalable architecture and highest security standards
- Open platform enables support of customers

Customer Situation
- Manufacturer with locations in 7 countries
- Need for reliable, safe, and cost-effective IT support from centralised IT helpdesk for all countries

Challenge
- International expansion requires a scalable solution
- Occasional external customer support provided by an internal helpdesk

MACO Employee

TeamViewer

MACO IT Helpdesk

Technical Issues

"We are very happy with TeamViewer. The software lets us handle support cases efficiently"

"Unlike before, we now enjoy stable connections every time, which has allowed us to cut the support cost by 20 percent"

"With TeamViewer, we feel well-equipped to handle further growth, including on the IT support side"

Source: Company information

Centralising Digital Signage Management

PHILIPS

Remote input to commercially used screens worldwide
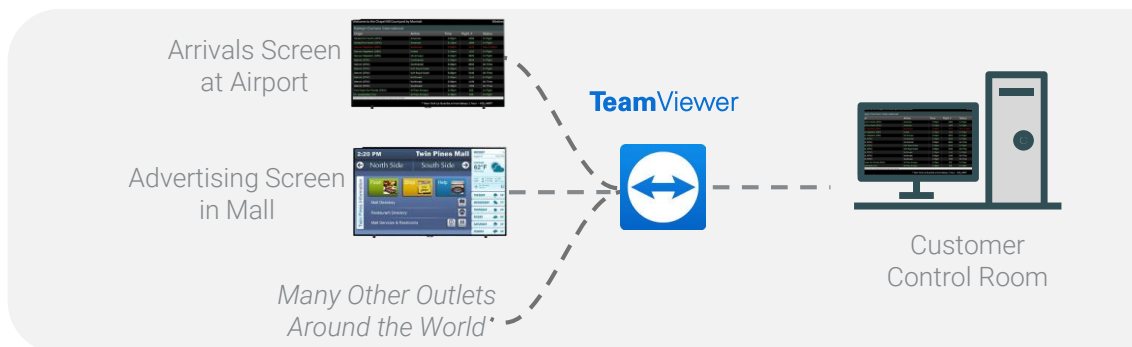
TeamViewer Solution	• Single platform for Philips clients to manage their professional signage screens worldwide • Pre-installed on many screens by default
Customer Situation	• Philips needs solution for its customers to access commercial screens • Screens used for wide array of applications
Challenge	• Signage screens distributed worldwide, partially in limited bandwidth locations • 24/7 access needs to be ensured in all locations

Arrivals Screen at Airport

Advertising Screen in Mall

Many Other Outlets Around the World

TeamViewer

Customer Control Room

"We have embedded [...] TeamViewer in all our signage screens"

"You have total control of what is happening [on the screen] everywhere in the network globally."

"We can change picture content anywhere across the globe"

Source: Company information

Enabling Smart Agriculture & Farming

Trimble

Revolutionising agriculture through monitoring, control, and technical support
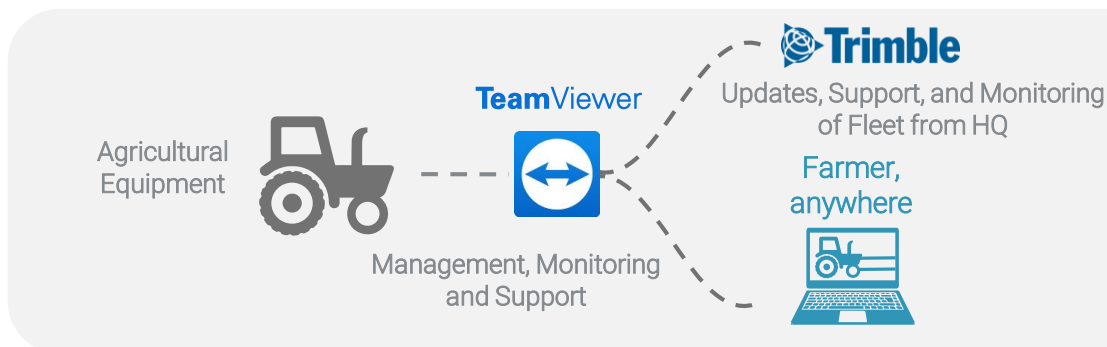
TeamViewer Solution	• Pre-installed on Trimble devices for remote fleet management and monitoring from factory • Broad remote management capabilities for farmers
Customer Situation	• Agricultural equipment geographically dispersed, oftentimes in remote regions • Functioning equipment is business critical
Challenge	• Smart farming equipment increasingly complex requiring frequent technical support • Increasing data intensity of smart farming methods

Agricultural Equipment

TeamViewer

Management, Monitoring and Support

Trimble
Updates, Support, and Monitoring of Fleet from HQ

Farmer, anywhere

""We were really ecstatic when we found out that Trimble had partnered with TV […] We were just able to log in remotely"

"With TeamViewer customers did not have to explain what they are seeing [on their equipment]"

"He logged in from Ottawa which is a 1.5 hour drive away and fixed [the connectivity issue]"

Powering Remote Physical Therapy

MediTouch offers patients secure at home physical therapy sessions with TeamViewer
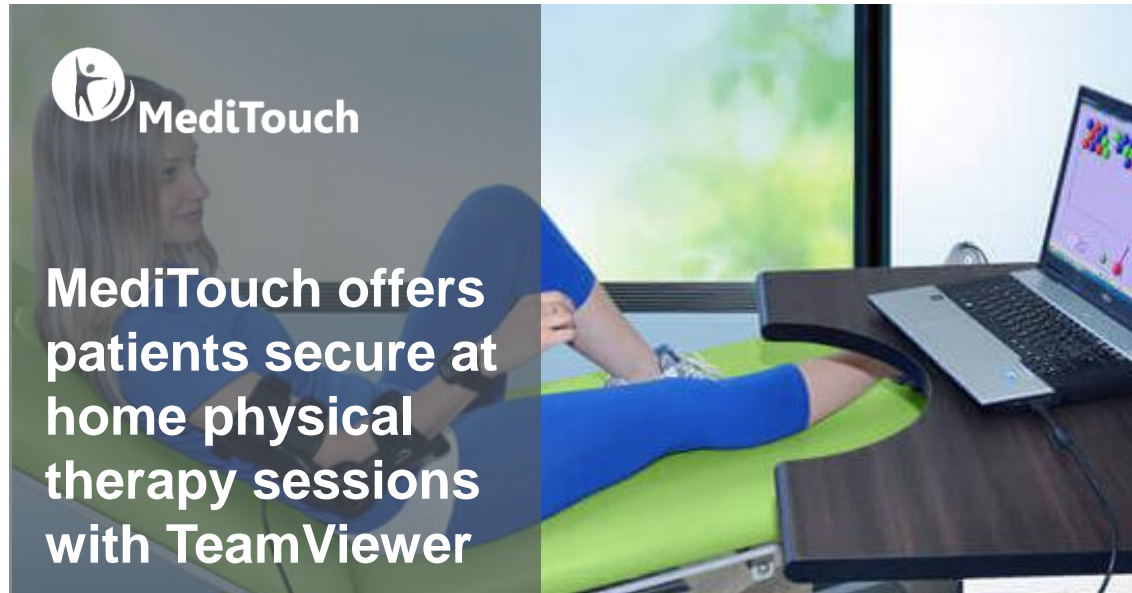
TeamViewer Solution	• Tele-rehabilitation solution allowing therapist to see and interact with / give feedback to patient • Monitoring of specialised therapy devices
Customer Situation	• MediTouch requires interact solution to make disruptive tele-rehabilitation possible • Rehab devices create data and need to be monitored
Challenge	• Patients with different operating systems / devices at home dispersed across country • Highest security requirements given data sensitivity

Patient Computer

TeamViewer

Rehab Device

MediTouch Monitoring of Rehab Devices

Interaction

Physical Therapist Live Feedback
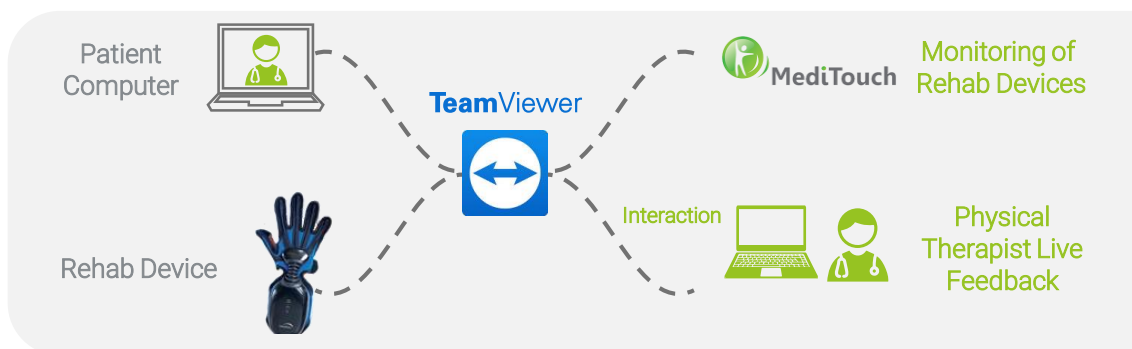
"We needed to be able to see the patients and adjust the rehabilitation in real time"

"After we did a trial with TeamViewer we realised it fits our exact needs"

Source: Company information

You can connect (nearly) everything