



K3

Connects

Uniting partners across the globe



Thank you to everyone who attended our second annual partner kickoff event last week. It was fantastic to see so many of you there to celebrate with us as our CEO, Marco Vergani, was joined by K3's product, sustainability, partner, and customer teams to discuss our 2022 accomplishments and our 2023 goals.

We'd like to say a special thank you to Ewan Dalton, Global Partner Development Manager at Microsoft, for joining us to share a recap on this past year's results, as well as the continued momentum partners can expect next year.

Watch the event on-demand [here](#).

Welcome and Keynote

Marco Vergani: CEO



Our company and strategy



Transforming retail for good

- Deliver transformative solutions for brands
- Fulfil retailers' mission-critical processes



Fashion, apparel, footwear and designer - solution leader

- Strong alignment with Microsoft Dynamics & Azure
- Full concept-to-consumer, end-to-end solution
- Focal market mid-large size clients with a "land and expand" approach



Differentiated Investments

- Support sustainability and ESG initiatives, end-to-end
- Deliver the best omnichannel unified consumer experience
- Inject Business Intelligence to support automation and decision making

We align to the key challenges identified by McKinsey



THEME 01

Metaverse Reality Check

The marketing value of digital fashion and NFTs may now be clear, but fashion brands will need to separate hype from the concrete opportunities to generate sustainable revenue streams presented by growing consumer engagement with the metaverse.



Fashion companies focused on metaverse innovation and commercialisation could generate more than 5 percent of revenues from virtual activities over the next two to five years.

THEME 02

Hyper Personalisation

Brands have access to a growing arsenal of personalisation tools and technologies to upgrade how they customise and personalise their customer relationships. The opportunity for executives now is to harness Big Data and AI to provide one-to-one experiences that build long-term loyalty.



71 percent of global consumers want companies to deliver personalised communications and products, and 76 percent are unhappy when this is not offered.

THEME 03

Connected Stores

The inexorable rise of e-commerce has forced fashion players to rethink the role of physical stores. Fashion executives can address consumer pain points by using in-store mobile apps to enhance the experience and micro-fulfilment technologies to leverage their physical retail networks for the quick-commerce era.

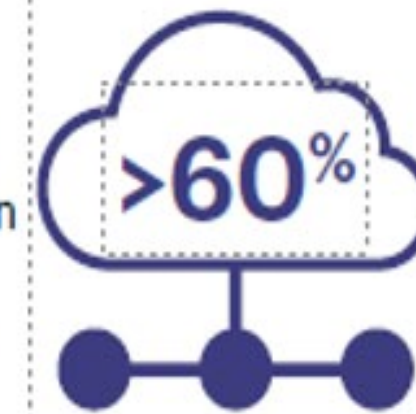


Customers who engage with in-store technology spend up to four times longer shopping than those who do not.

THEME 04

End-to-End Upgrade

Digital tools and analytics have transformed key parts of the fashion value chain, but these optimisations are often siloed within organisations, limiting the potential for cross-functional improvements. Brands should embark on end-to-end value chain integration to create more efficient and more profitable ways of operating.



More than 60 percent of fashion executives believe creating integrated digital processes throughout their organisations will be among their top-five areas for digitisation as they look ahead to 2025.

THEME 05

Traceability First

Traceability systems powered by tracking software and Big Data will help fashion brands focusing on sustainability to reach far into their supply chains to understand the entire lifecycle of their products.



More than 50 percent of fashion decision makers say traceability will be a top-five enabler to reduce emissions in their supply chains.

The State of Fashion Technology

May 2022: McKinsey

Our solutions



K3 Fashion

- Enterprise solution for fashion & apparel brands and retailers
- Embedded within Dynamics 365 ERP
- Full concept-to-consumer coverage
- Highly configurable
- CSR-specific module

K3 Pebblestone

- Any size solution for fashion, apparel brands and retailers
- Native and embedded within Dynamics BC/Nav ERP
- Full concept-to-consumer coverage
- Scalable, easy to integrate
- CSR Module (Agnostic)

K3 Imagine

- Robust unified commerce solution connecting inventory and customer experience
- Front-end (*POS, Checkout, Kiosks, Mobile*) and back-office connectivity
- Fully omnichannel
- Real-time orchestration and synchronisation of data across multiple legacy platforms
- Process designer tool allows integration without writing code

K3 ViJi

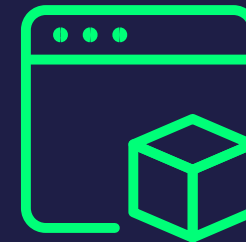
- Platform to collect, authenticate and validate any key CSR data or associated evidence from brands, suppliers and products
- Complete visibility into a brand's sustainability credentials
- Automated collection and renewals of certifications
- B2C widget and mobile app to display CSR product to consumers
- Standalone solution or full integration to other MSFT/K3 ERP/CSR products

2022 accomplishments



Market Dynamics & Initiatives

- Continued demand, Fashion and Pebblestone (20%+ Y/Y growth)
- Established strong presence in NA market
- Rebranding, strengthen K3's market message and positioning
- Massive growth against CSR and ViJi (100+ leads, over two-month span)
- Continued strength with our Microsoft relationship and Key Global Strategic Consultancy firms



Products

- Fashion: new PLM and CSR functionalities
- Pebblestone: new CSR, Cargo Management and Landed Cost app. Successful migrations of G1 on premise clients to G2 cloud versions
- ViJi: Acquisition, pilot clients and new forthcoming release
- Imagine: very successful market launch, active client migrations. Successful test of Imagine in Azure



Business Partners

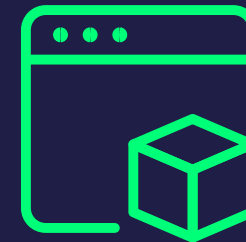
- Invested in resources to support and accelerate new opportunities with business partners
- Launched demand generation to drive market penetration
- Robust business partner in market event coloration and support

2023 key objectives



Business partner support – continued investment

- Fashion/Pebblestone expertise to directly accelerate opportunities
- ViJi and Imagine available to our business partners' portfolio - huge upsell/cross sell opportunity
- New Learning Management System to provide business partner training courses and certifications on our products



Products

- Fashion/Pebblestone: Telemetry, PLM and Manufacturing enrichment
- Integrations with Imagine and ViJi.
- Imagine: alignment to Azure. New UI/UX, launch Headless and Hardware agnostic version
- ViJi: further development to support new regulations and provide the best traceability solution for fashion/textile



Customers

- Thought Leadership and support offering for CSR
- Extending customer input and feedback to shape our product roadmaps
- New Customer Support Tool
- Evaluating an extension of Learning Management System to customers to support user training, knowledge acceleration

Business partners are critical to our success



Our sole channel to the market

- We specialise in software development of mission-critical applications
- We value our business partners knowledge in fashion and apparel

What we want to do better in 2023

- Continue to support you as early as possible
- Maintain our visibility within Microsoft
- Continue to generate demand and market penetration
- Continue to invest in customer success

What we ask from you

- Engage our team as early as possible, together we can win more
- Provide feedback on client requirements and innovation
- Evaluate K3 Imagine as a strong complementary headless application
- Support you to enable your client's ESG efforts

Latest news and insights from our product team

Andrew Payne: Chief Product
Officer



Andrew will be joined by...



MATTHEW WARR
Director,
K3 Imagine



ALY BREEMAN
Product Manager,
K3 Pebblestone



GERARD SWEBEN
Product Owner,
K3 Fashion

K3 Products and Software



Develop the **Digital Platform of the future** for the fast-changing world of Fashion and Retail that promotes **sustainable business**, brings together the **end-to-end experience**, empowers people to take **smart actions**, and **transforms the industry for good**



SUSTAINABILITY

Enabling sustainable business models and practices in the fashion and apparel sector



END-TO-END EXPERIENCE

Improving the end-to-end experiences throughout the fashion, apparel, and retail value chains



INTELLIGENCE

Enhance business insights to empower smarter actions



USABILITY

Designing products that people love to use and promote end-user productivity



ENABLEMENT

Making our products easier to deliver and support for K3, Partners and our Customers

Questions

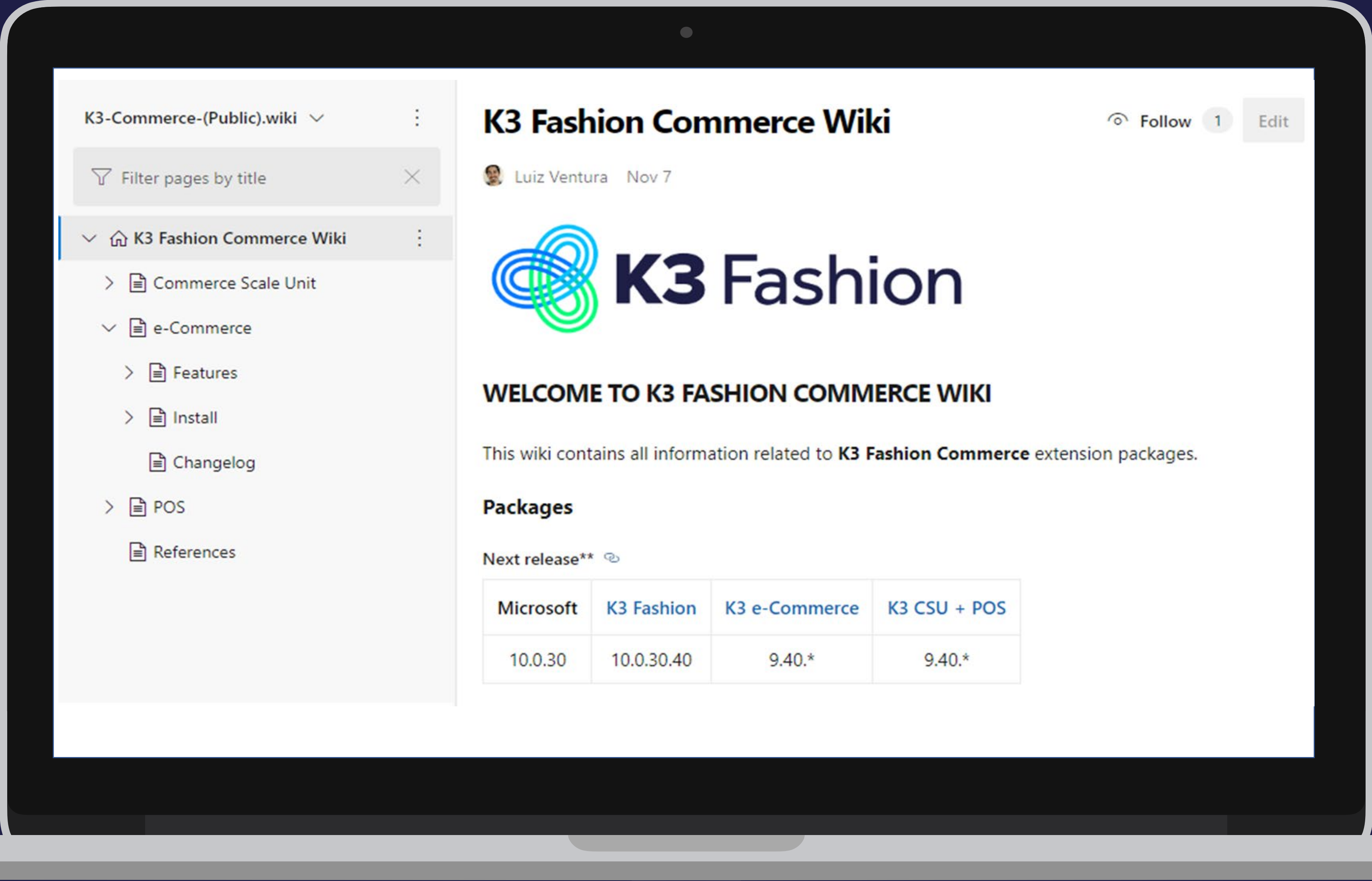


K3 Fashion

- Where will the team be investing their time in the year ahead?
- What future opportunities do you see to combine or integrate with other products and how is that going to benefit brands out there and their operations?



K3 Fashion: Commerce Wiki

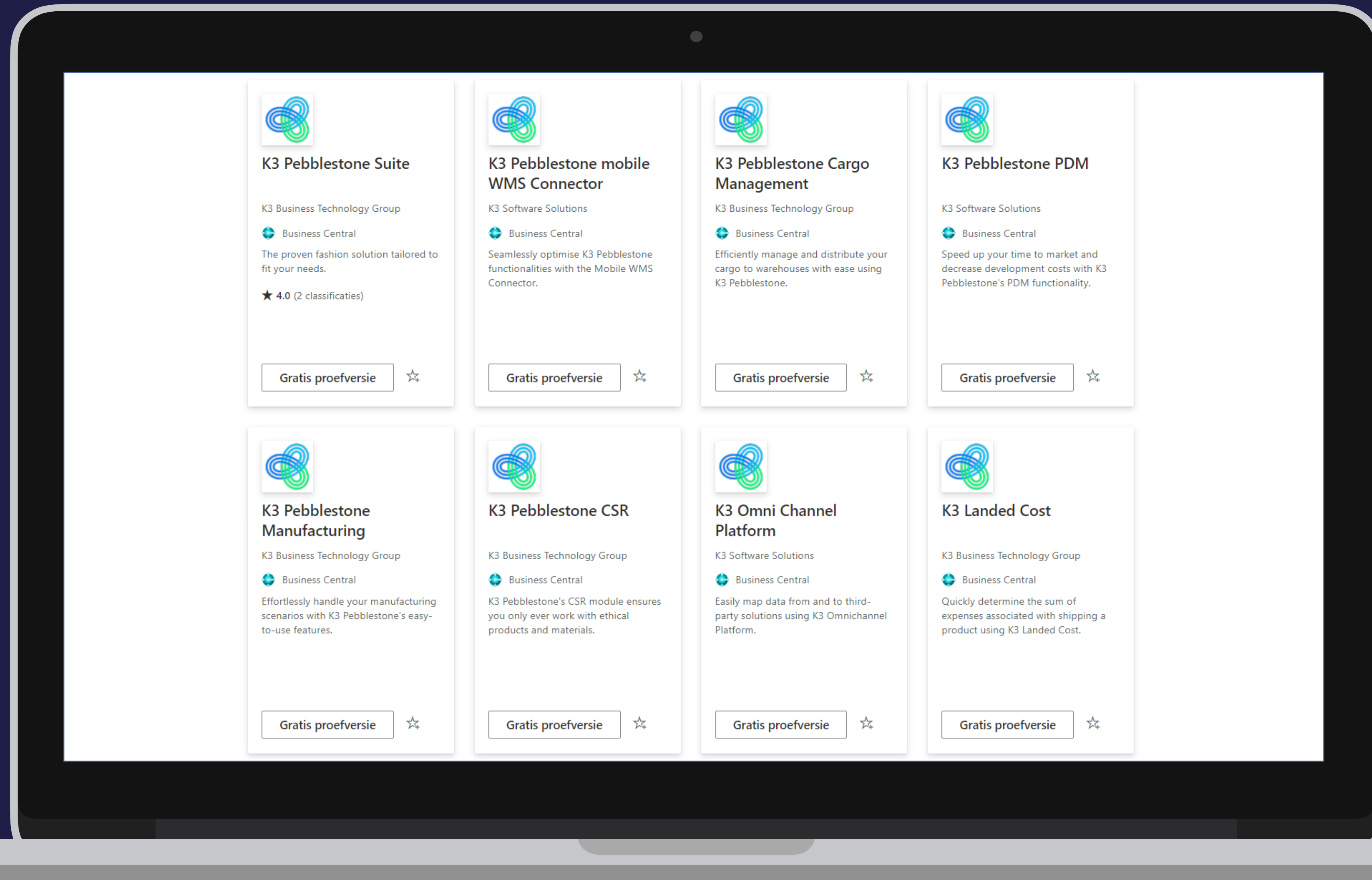




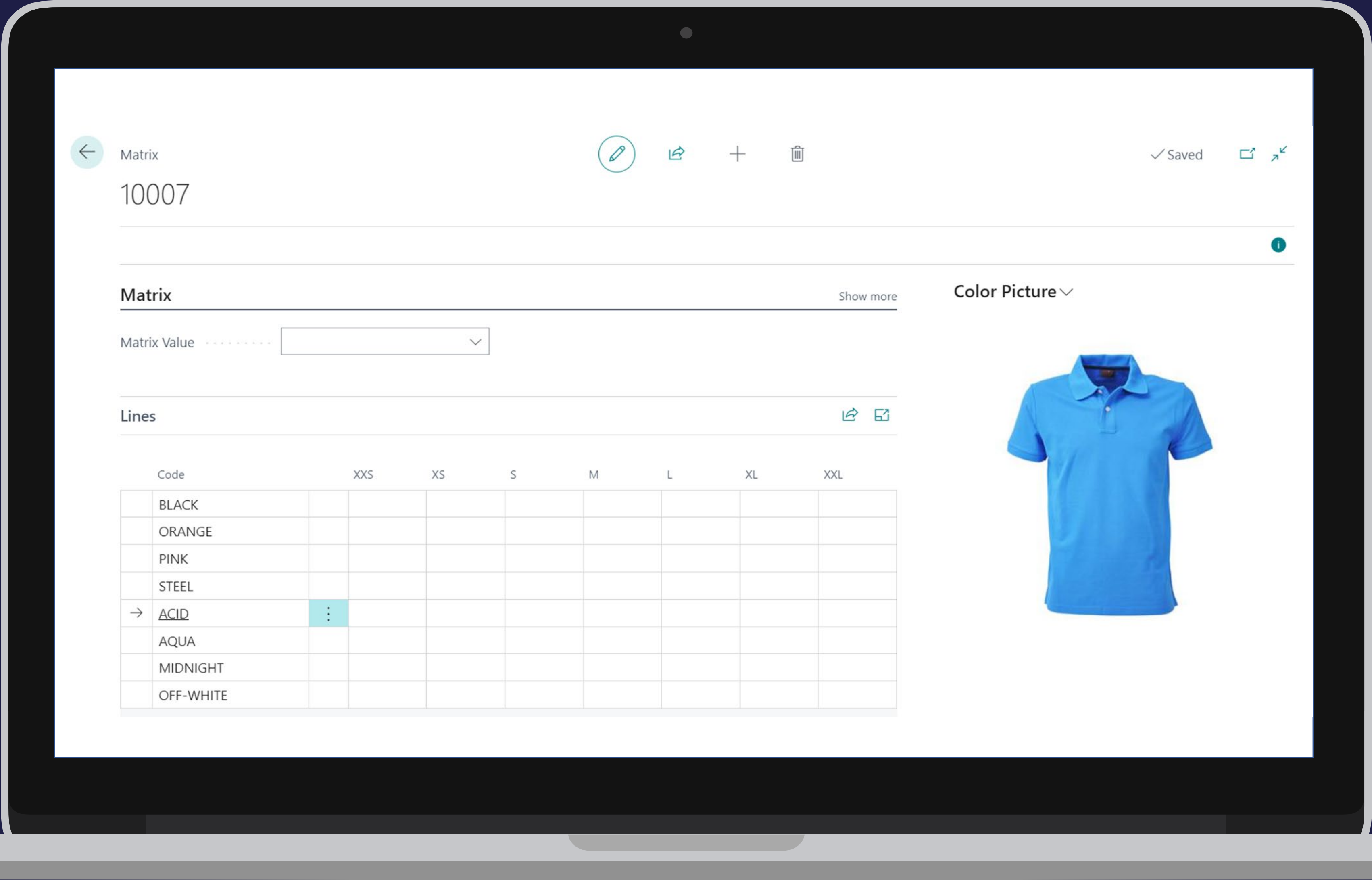
Questions



K3 Pebblestone: New Apps in 2022



K3 Pebblestone: Colour and Size Matrix



K3 Pebblestone: Colour Size and 2nd Matrix

←

Matrix

10056

✎
↗
+
🗑

✓ Saved
↗
↗

Matrix

Matrix Value

.....
▼

Show more


Lines

Manage

↗
🗑

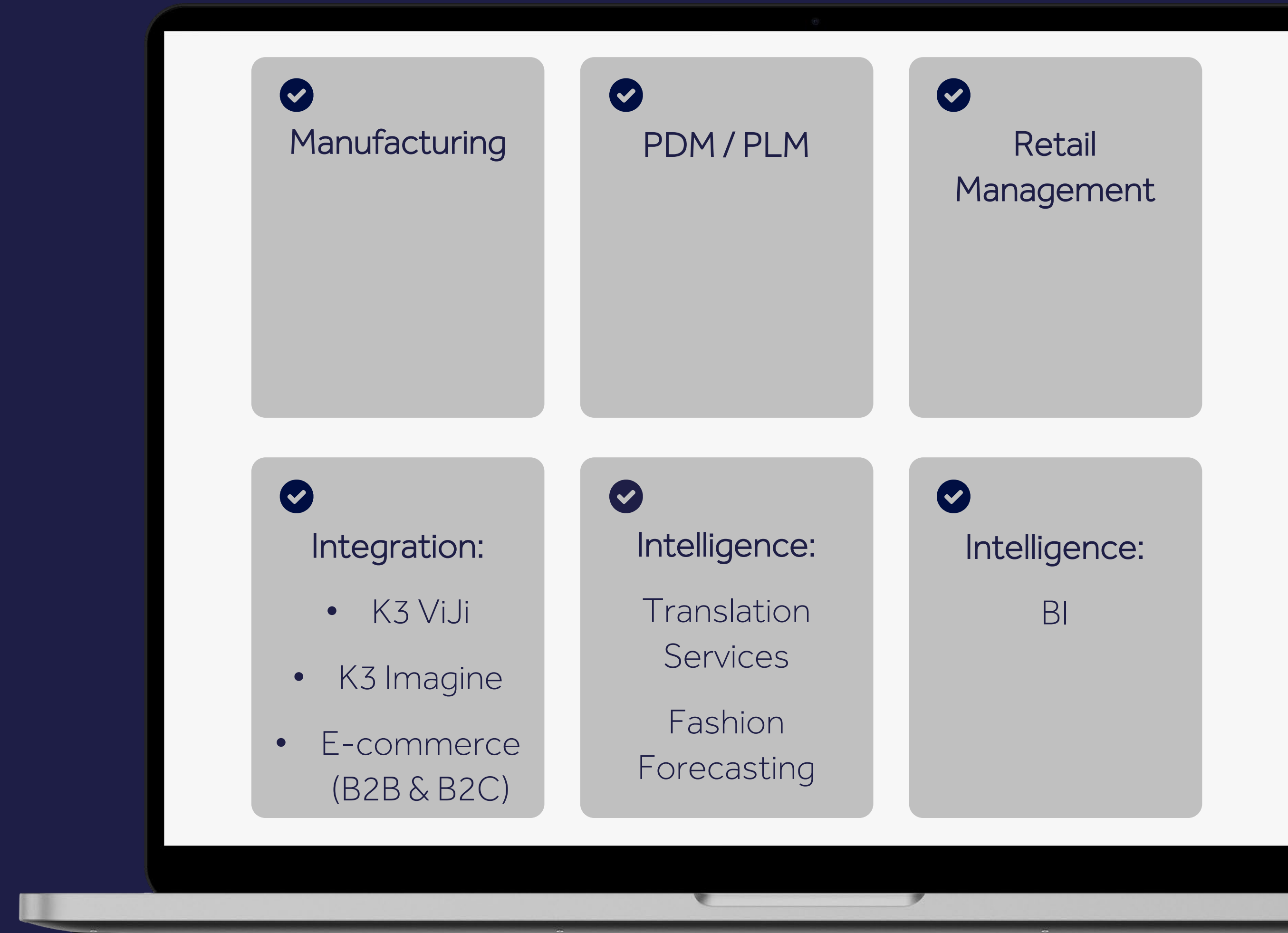
Code	28	29	30	31	32	33	34	36	38	40
BLACK										
28										
30										
32										
34										
36										
→ BLUE	⋮									
28										
30										
32										
34										

Color Picture ▼



K3 Pebblestone

- As you plan for the year ahead – what areas will you be focusing on to ensure Pebblestone continues its marketplace differentiation and powerful connection to our end-users?





Questions

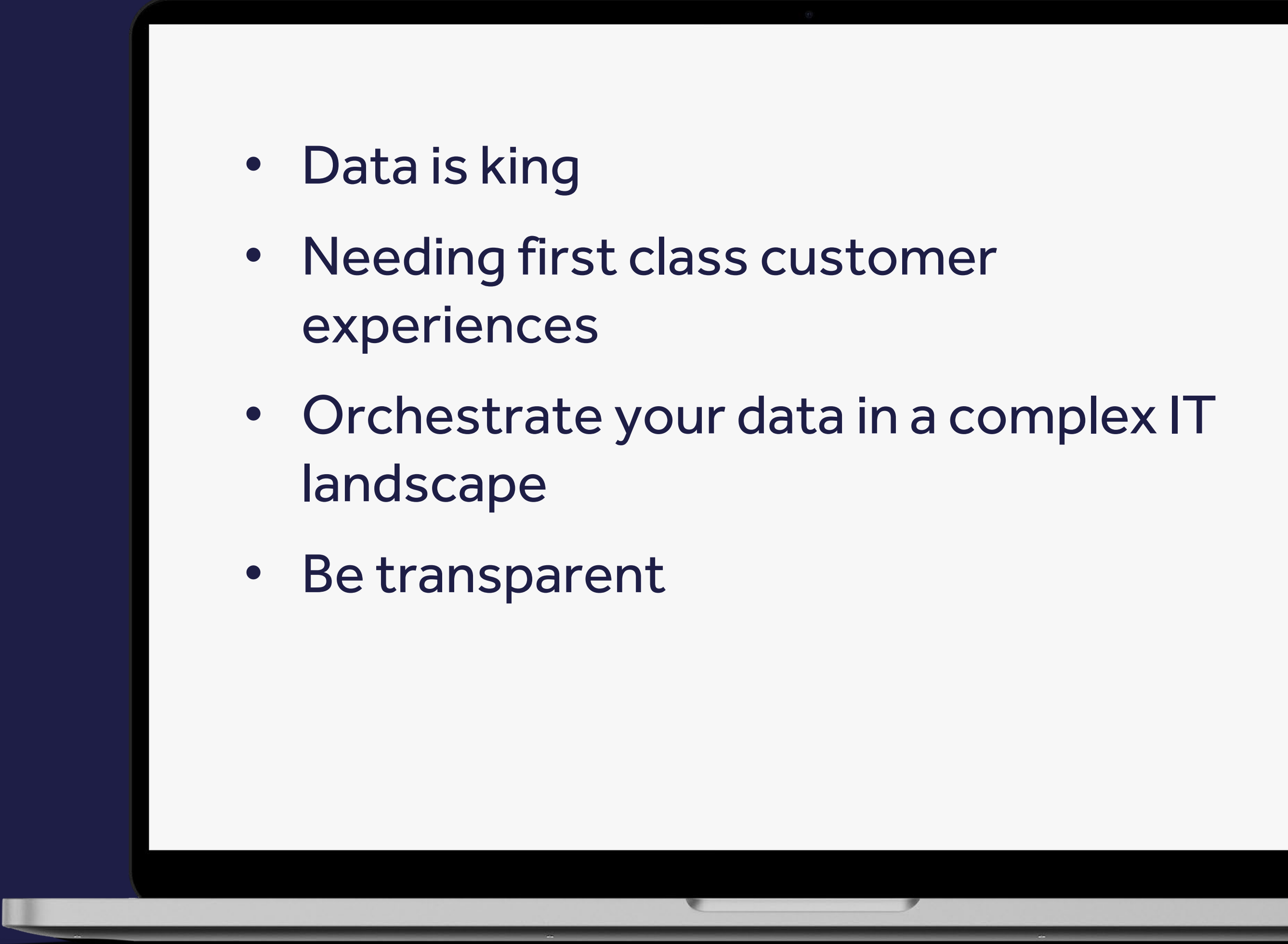


K3 Imagine

It seems like the days of having an either/or shopping experience are gone...

- Consumers were embracing the convenience, and safety, of e-commerce during the Covid-19 pandemic.
- 60% of respondents in a survey wanted to see or touch products in-person before buying

What are the most important factors businesses need to be considering in a connected store?

- 
- Data is king
 - Needing first class customer experiences
 - Orchestrate your data in a complex IT landscape
 - Be transparent

K3 Imagine

When you think of the many areas of acceleration Imagine offers, which are you most excited to talk to Partners and customers about?

- No need to rip and replace
- Get your data where you need it – without needing a developer
- Great for IT teams
- Great for partners
- Composable Headless POS and APIs
- Invested in functionality for larger organizations

Sustainability research and insights

Gabrielle Hase: Non-executive
Director



Gabrielle will be joined by...



**ANNE-LAURENCE
VILLEMONTEIL**
Product Director for
Sustainability Solutions



JOSSELIN VOGEL
Director of Business
Development for
Sustainability Products

67% of fashion and retail decision-makers said that recent events such as COP26 and the Climate Red reports have changed their thinking on how their brand tackles sustainability

YES, sustainable initiatives will become a priority moving forward



28%

YES, we intend to focus more on sustainability



38%

NO, these events have not changed our thinking



25%

Don't know



14%

Only 46% companies with 1 - 25 employees

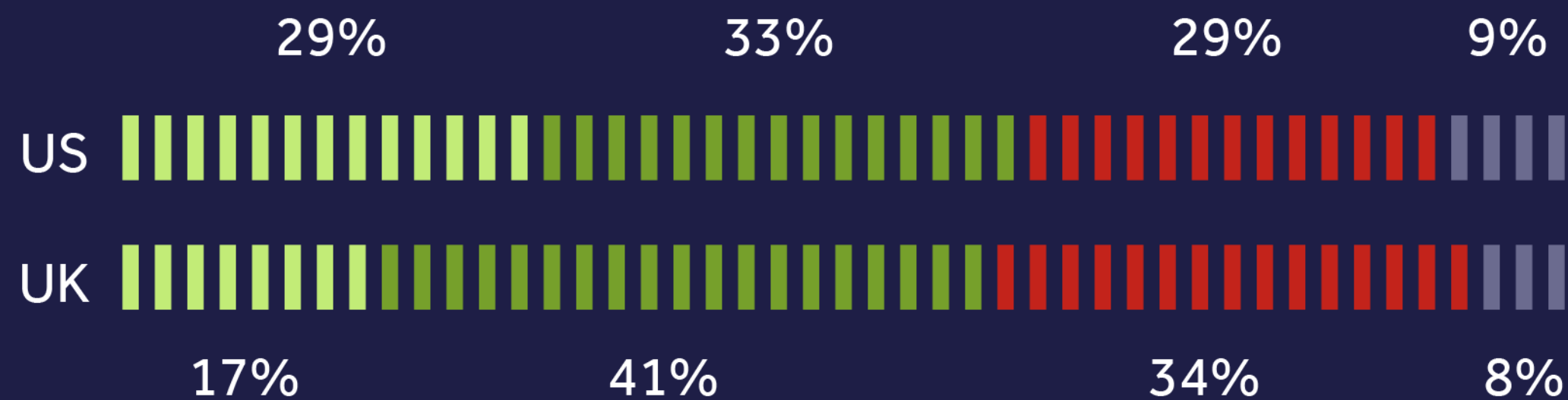
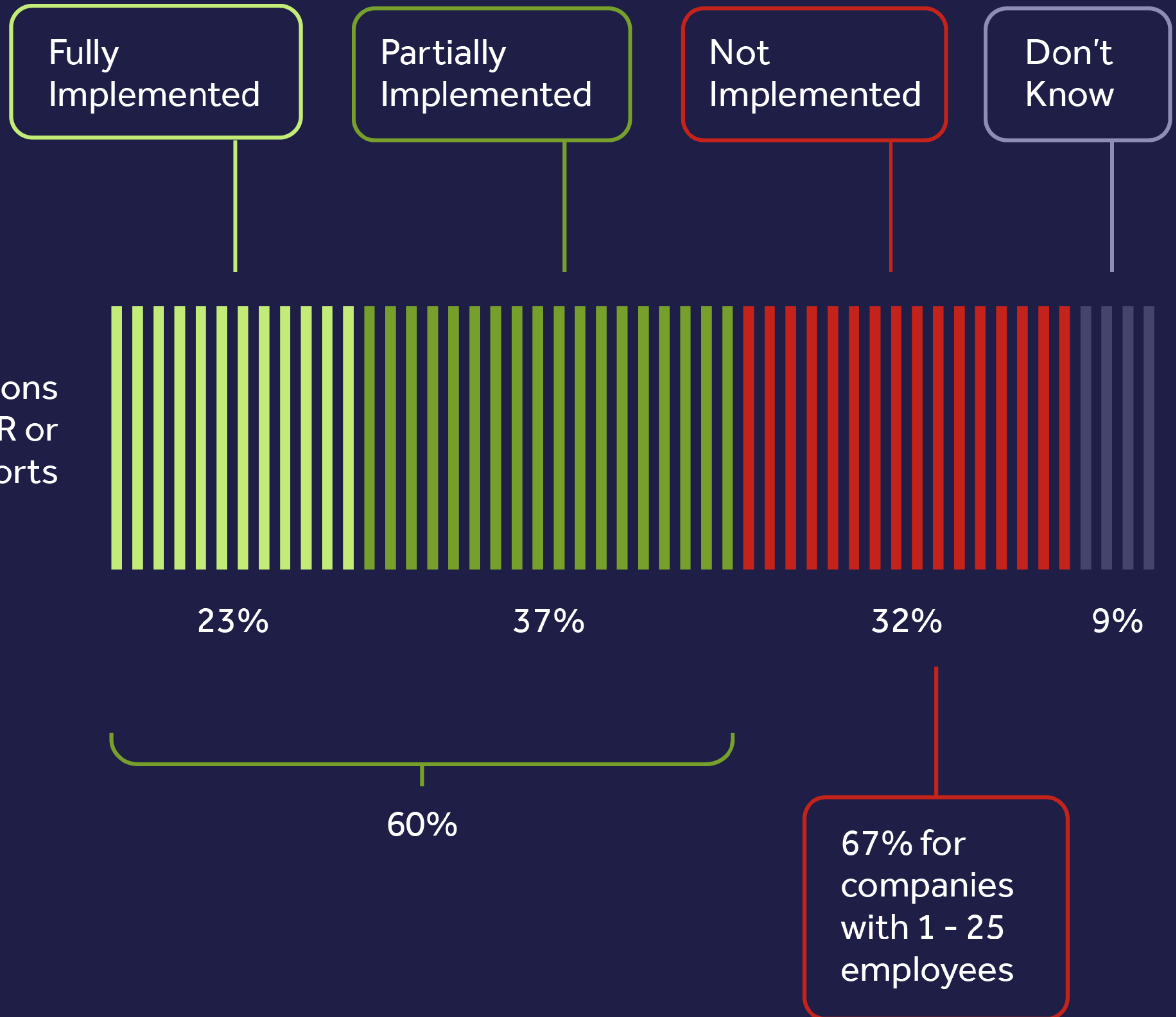
59% US vs 75% UK

67%

60% have at least partially implemented technology or IT solutions for managing CSR or sustainability efforts,

23% have fully implemented them

US respondents were more likely to have fully implemented them

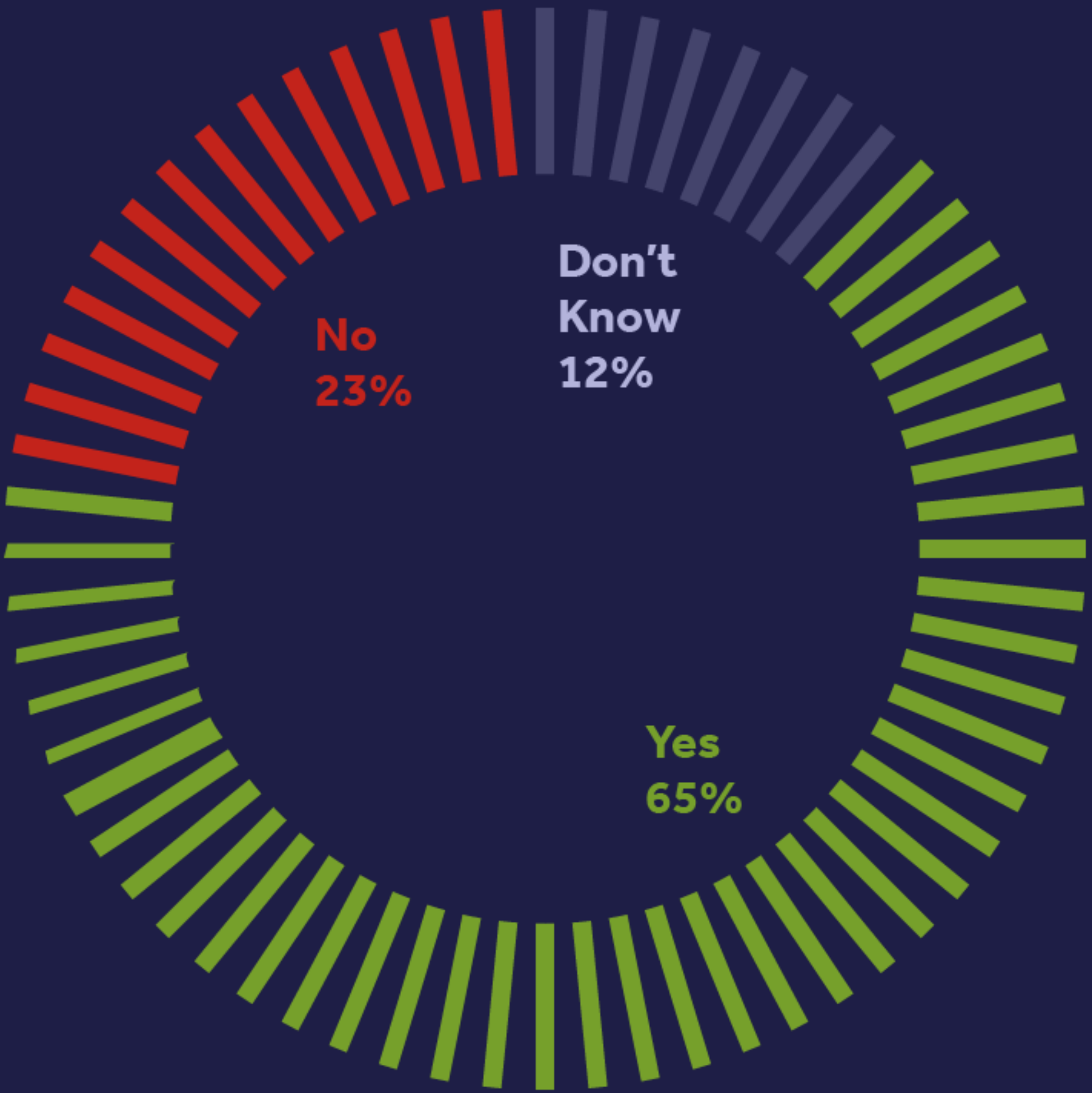


65% say supply chain transparency is a focus for their sustainability efforts

29% say they have all the supply chain technology they need to manage it more ethically and sustainably

Company Size	% Yes
1 to 25	48%
26 to 250	73%
251 to 1,000	78%
1,001 to 10,000	77%
10,001 +	68%

Is supply chain transparency a focus for your sustainability efforts?



Review of 2022 and a look to the future with our partner team

Kimberly Morgan: Global Head of Sales



Kimberly will be joined by...



RODERICK MADNA
Partner Director,
APAC and EMEA



TINA TERREZZA
Partner Director,
Americas



TONY BRYANT
Director,
Microsoft Global
Alliance

Global partner channel recap and look ahead



Microsoft

- Microsoft Cloud for Retail
- Supply Chain Platform
- MCAPS
- Microsoft Global

Americas

- Incredible momentum
- Microsoft Co-Sell-A-Thon
- Launching Allbound a new K3 Partner Portal
- Global Enablement and Collaboration

EMEA and APAC

- More incredible momentum
- ISV Embed and CSP
- Regional expansion

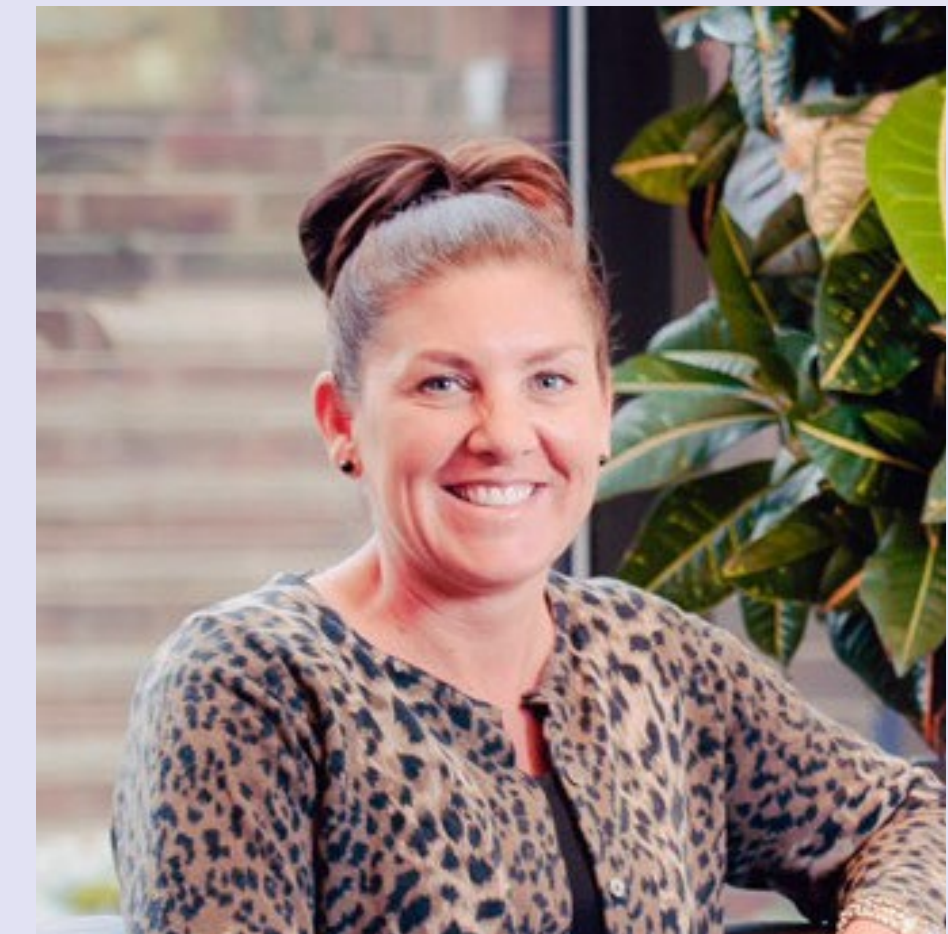
An update from our customer success team

Caroline Eva: Global Director of Customer Success
Management



About me

- Global Director, Customer Success Management at K3 since July 2022
- Previously worked in another division of K3 for 16 years
- Over 15 years experience of ERP solutions and technology



Caroline Eva

Global Director, Customer
Success Management

Our team



- ✓ Team of 7 Customer Success Managers, soon to be 8

- ✓ Global approach to customer success management

- ✓ Across 7 countries, soon to be 8: UK, Ireland, Germany, Netherlands, Nordics and the US in Q3 2023

- ✓ Languages we speak: English, German, Dutch, Nordic, French

Immediate and mid-term partner activity

- Clearly defined understanding of what a successful journey looks like for all our K3 Fashion customers as of 1st December 2022.
- There are gaps in the current customer journey, particularly post sale, I will be looking to improve on this.
- The CSM's will work with the K3 partner managers, Partners and Customers to improve this journey and experience.



Dedicated Customer Success Manager (Q1 2023)



We will work to achieve a well defined customer experience



Regular customer objective reviews



Product and product roadmap insights



Access to other members of the team



Activities and desired outcomes for Q1 defined



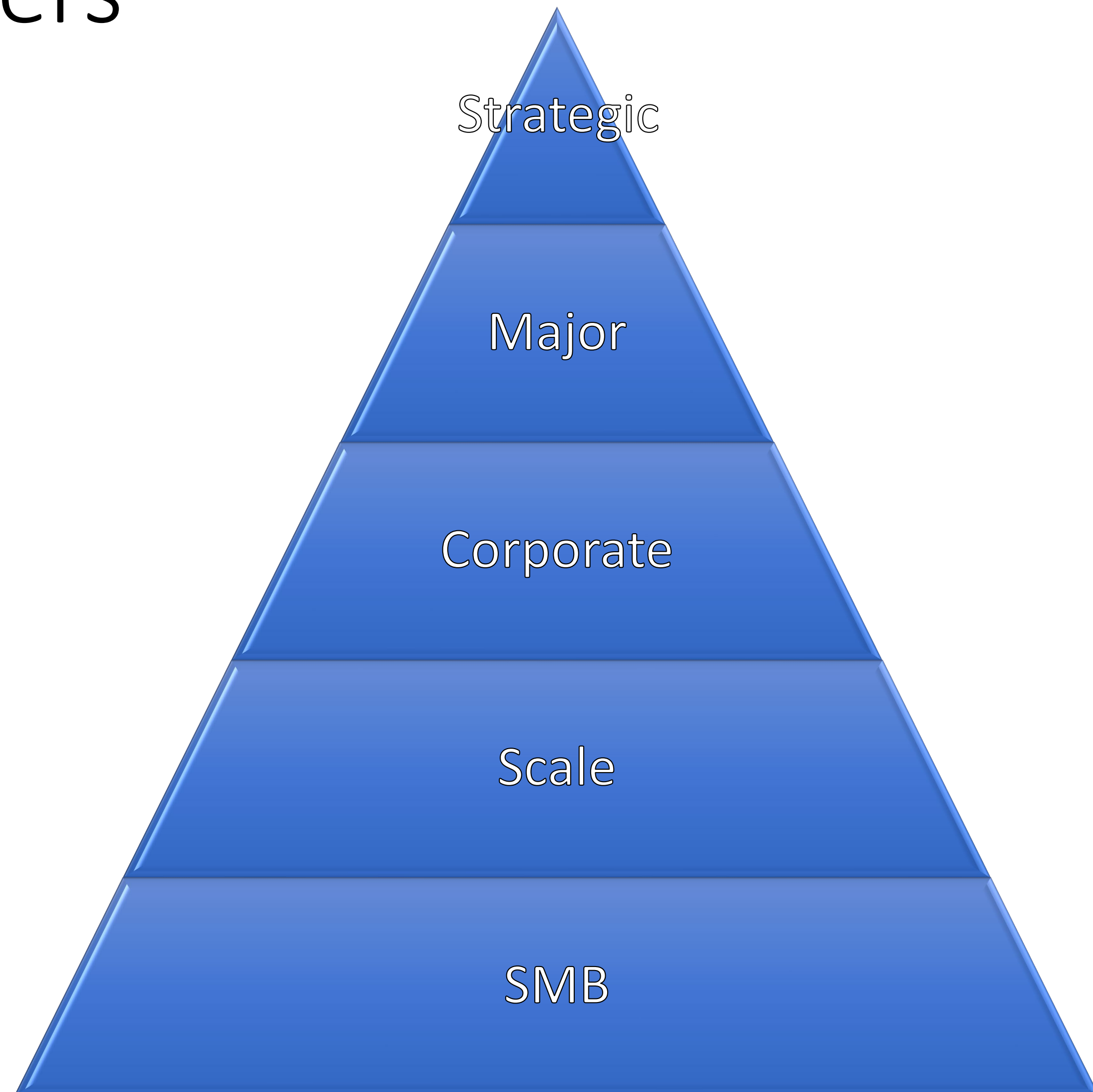
Partnership goals; Microsoft customer management; sales processes and targets

Ewan Dalton: Global Partner Development
Manager
Microsoft




Microsoft by the numbers





- MS - ~ 230K employees
- 35K managed customers
 - ~500 “Strategic” – 1:many
 - 10K “Major” – few:1
 - 24.5K “Corporate” – many:1
- ~100Ks “Scale” accounts
 - SMB – Millions+



Who's Who




Satya Nadella
(satyan)
CEO
Building 34/5320
Office of the CEO



Organization: 403,031
232,729 Employees
43,121 Open
125,545 Externals
1,636 Interns


Reports: 16
15 Employees
1 Open


☐ Show open positions ☒ Show only employees ☐ Show all reports



Amy Hood
EVP, CHIEF FINANCIAL O...
Office of the CFO


30,611 reports
621 open






Jason Graefe
VP, STRATEGIC ADVISOR AND...
Office of the CEO


19 reports






Kevin Scott
EVP, CTO MICROSOFT
Office of the CTO


2,729 reports
2,772 open






Brad Smith
VICE CHAIR AND PRESIDE...
CELA Exec Team


3,435 reports
277 open






Jason Zander
EVP, STRATEGIC MISSIONS...
SMT Central_RnD Team


6,594 reports
536 open






Phil Spencer
CEO, MICROSOFT GAMING
Xbox Mgmt R&D


11,294 reports
567 open






Charlie Bell
EVP, MICROSOFT SECURI...
MS Security - Manageme...


10,854 reports
2,328 open






Jean-Philippe Courtois
EVP, NATIONAL PARTNERSHIPS
NTP HQ FR 1081


16 reports
6 open






Rajesh Jha
EVP, EXPERIENCES + DEV...
Experiences + Devices M...


61,214 reports
10,963 open






Chris Capossela
EVP, CHIEF MARKETING ...
Mktg & Consumer Busine...


11,483 reports
600 open






Judson Althoff
EVP & CHIEF COMMERC...
MCAPS HQ


106,029 reports
10,921 open






Ryan Roslansky
CEO
LI_100_5000_0000_Executi...


26,969 reports
611 open






Chris Young
EVP, BD, STRATEGY, & VENT...
BD Mgmt


352 reports
31 open






Kathleen Hogan
EVP, HUMAN RESOURCES
Office of CPO People


5,474 reports
584 open





Scott Guthrie
EVP, CLOUD + AI
C+E Management - R&D

82,822 reports
12,303 open





Microsoft Customer and Partner Solutions

ORGANIZED AROUND FOUR PRIMARY PILLARS



Industries
& segments



Solution
Areas



Regional
leadership



Strategy
& Operations

63K+

employees

6,872

managers

190

countries

17,253

new hires since
start of pandemic

12K+

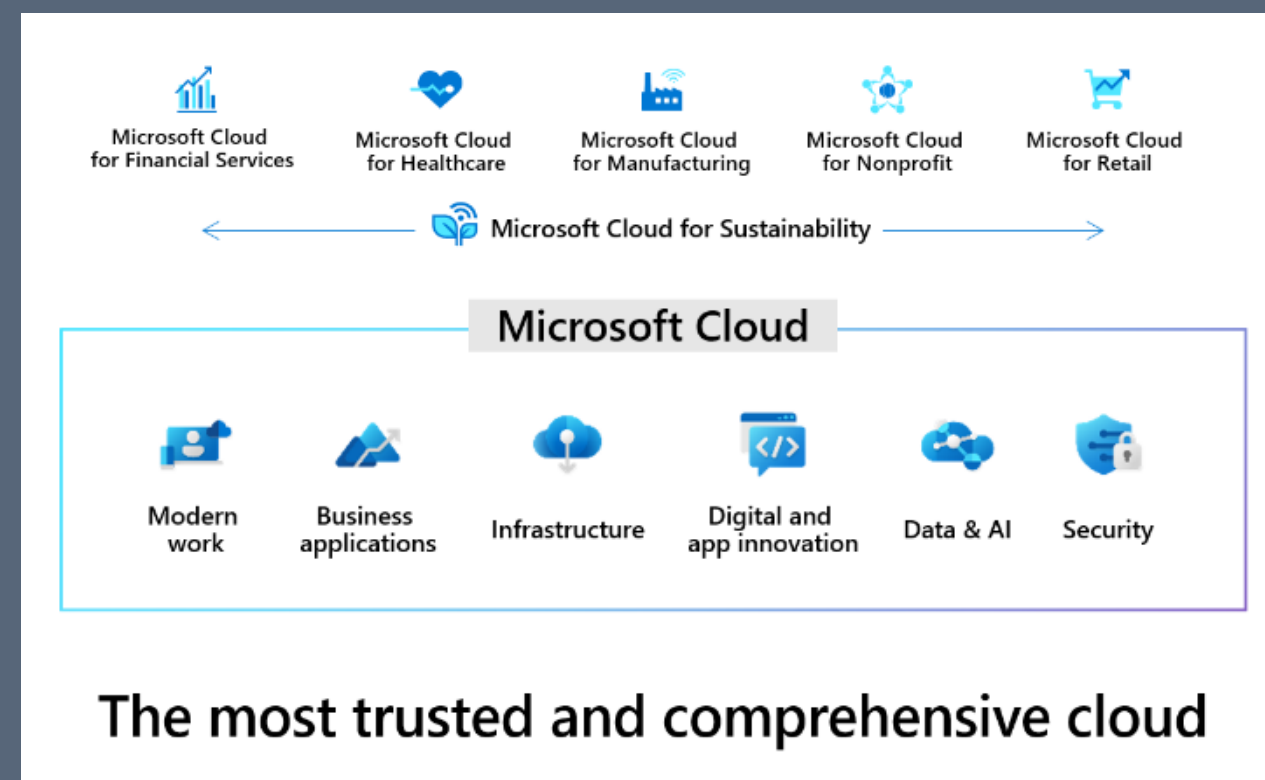
promotions in CY 2021



We are all sellers

What we sell

Microsoft Cloud



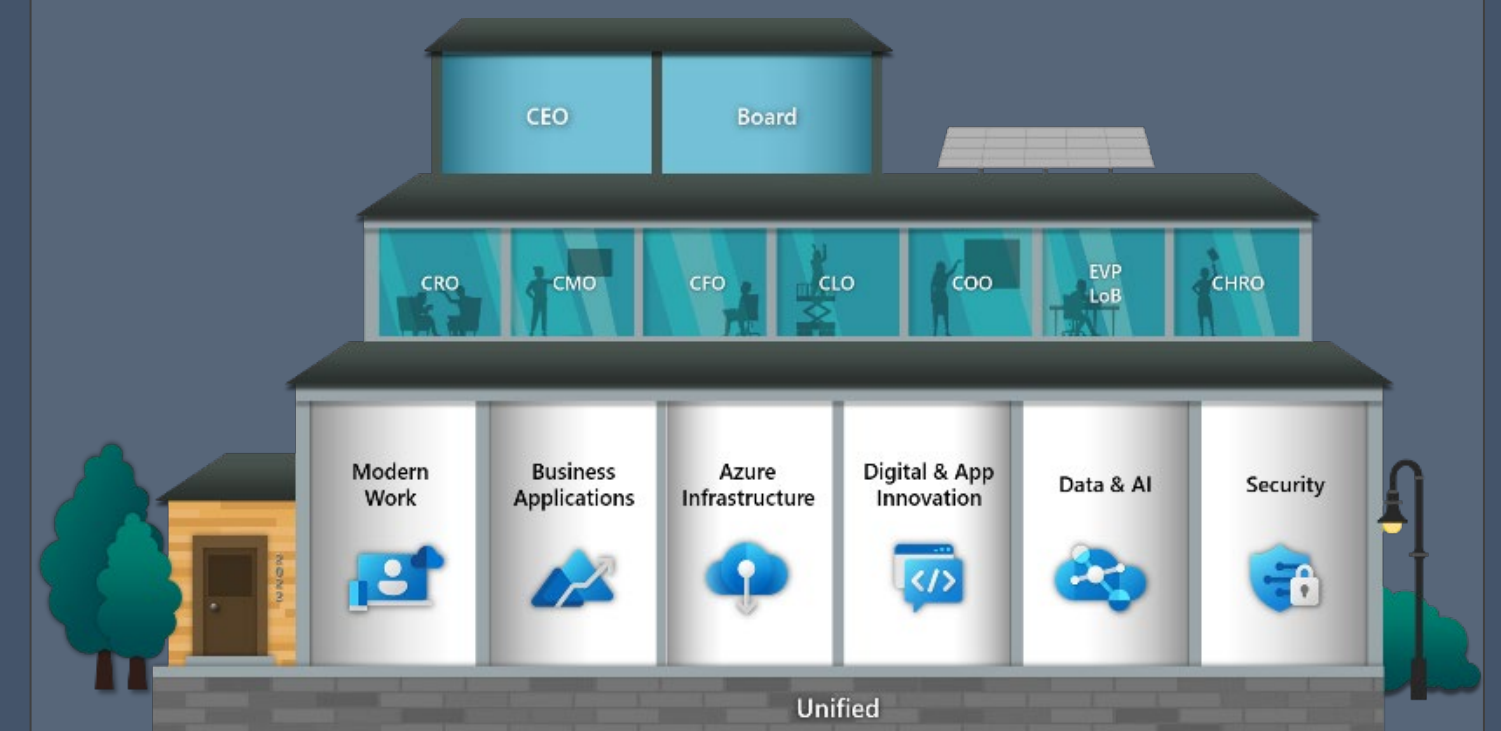
How we sell

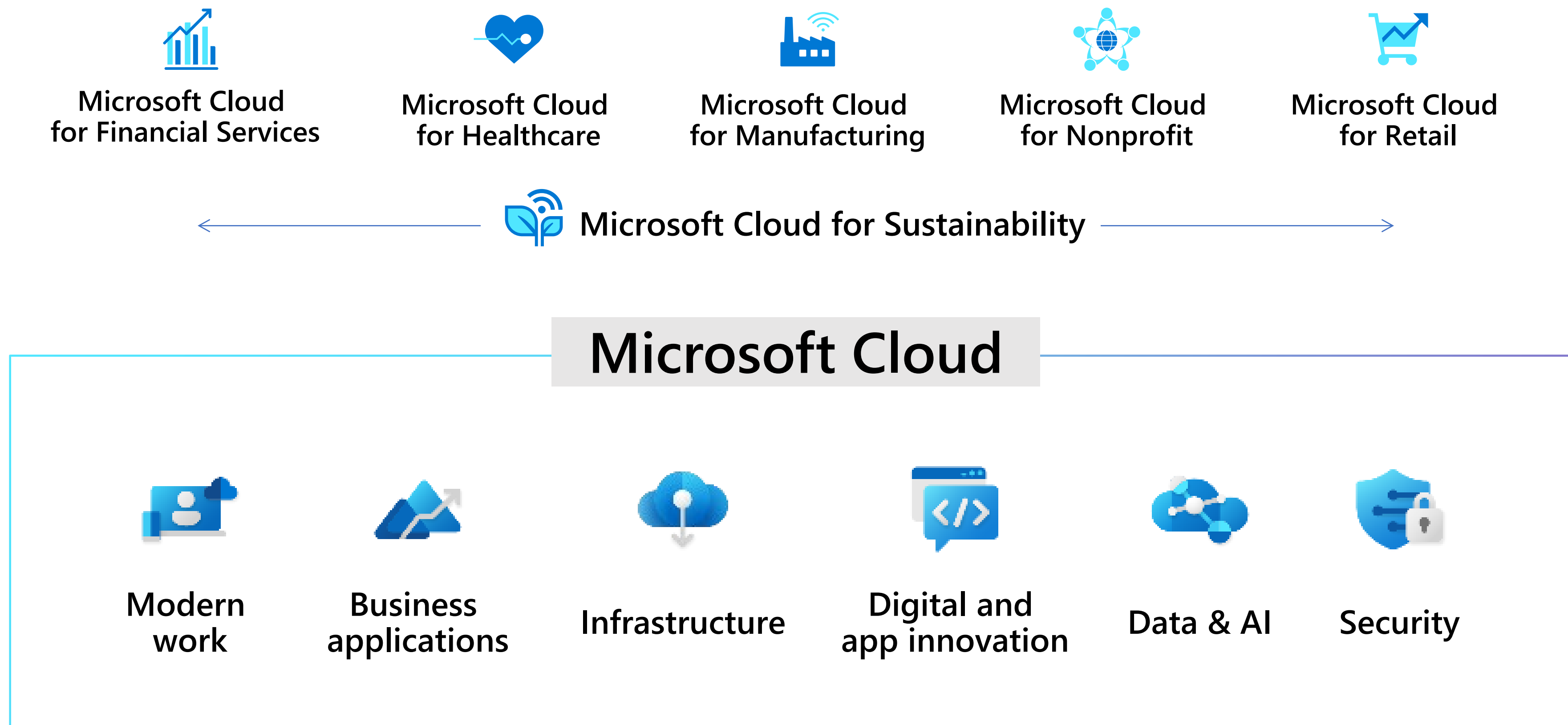
DT7 + MCEM

- Well-architected IaaS
- Power Apps & Teams
- D365 modularity
- 3rd party SaaS on Azure
- Modern Data Services
- DevOps & GitHub
- Security as foundation

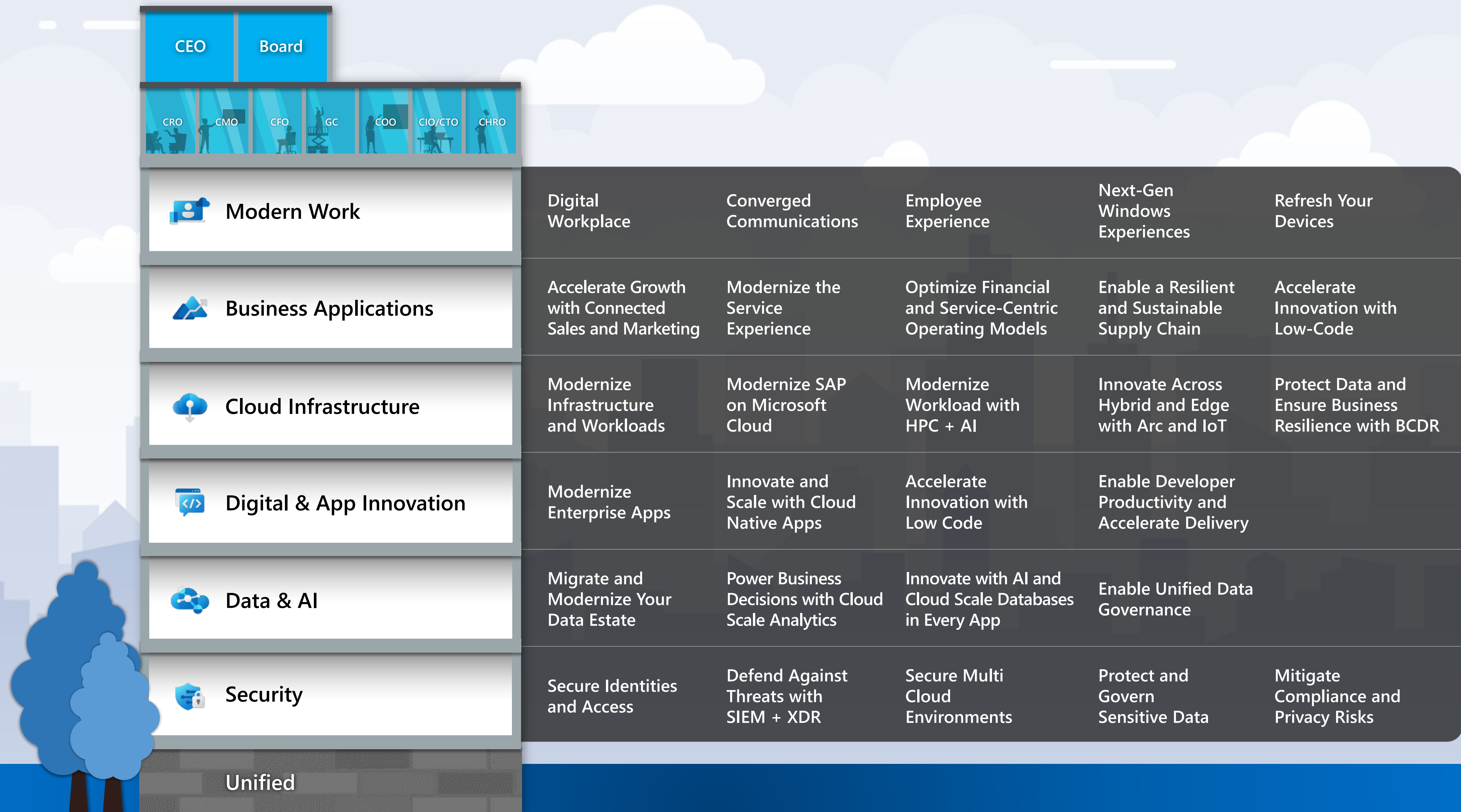
To whom we sell

Rooms of the house





The most trusted and comprehensive cloud



DT7

7 questions to ask a customer

But first...
How are you looking to transform your business?

- 1 What of your application portfolio really needs to go away, rather than be migrated to the cloud?
- 2 How do you think about collaborative applications? OR Have you ever thought about using a low-code no-code capability to replace legacy applications?
- 3 Don't you think it's time to look at more professionally- developed SaaS offerings?
- 4 How do you think about ISV applications that run on our portfolio?
- 5 How are you leveraging your data estate to support your digital transformation?
- 6 How are you thinking about cloud native applications and prioritizing the work of your developers and your in-house expertise?
- 7 What is your cyber strategy and how are you thinking of security as the foundation for your digital strategy?

FY23 Solution Area Key Motions



Modern Work

- E3: Teams, Platform, FLW, Win 11
- E5: Phone, Security (Compliance)
- Expansion: Viva
- Surface
- Usage is Critical



Security

- Threat (XDR + SIEM)
- Compliance
- Azure and Multi Cloud
- Secure Identity and Access



Business Applications

- Category Excellence
- Low-Code Acceleration
- Viva Sales, Customer Insights, Digital Contact Center (Nuance)
- Paid to Active Usage



Azure Infrastructure

- Maintain and Expand workloads
- Migrate Windows Server & SQL
- Migrate SAP
- Leverage Cloud Ready Score



Digital & App Innovation

- Innovate & scale with cloud-native apps (AKS, Serverless, PowerApps)
- Modernize Enterprise Apps (Java, .Net, Integration)
- Enable Developer Productivity (GitHub)



Data & AI








- Migrate SQL
- Analytics
- Cosmos DB



Support

- Increase Unified penetration
- Enhanced Solutions in Solution Plays
- Penetrate through EA/MACC motions
- Transition from billable to value-based model

FY23 commercial solution area and industry partner GTM priorities

Solution Area		FY23 Partner priorities		
FY23 Rev/YoY %				
	Modern Work \$54.8B / 15% YoY	<ul style="list-style-type: none">Win hybrid work w/ Teams integrated partner motions (Room, Phone, Platform)	<ul style="list-style-type: none">Develop growth bet (Viva, W365, FLW) partner capacity to drive new rev in key markets	<ul style="list-style-type: none">Scale standalone offers, seat acquisition and Telco motion to drive SMB NPSA
	Security \$29.5B	<ul style="list-style-type: none">Recruit and develop MSSP/XDR & compliance partners to drive rev and usage	<ul style="list-style-type: none">Integrate Azure Security in Azure Infra to maximize impact	<ul style="list-style-type: none">Accelerate Security usage with FTR partners
	Business Applications \$7B	<ul style="list-style-type: none">Activate GSI practices with category execution excellence to win enterprise	<ul style="list-style-type: none">Scale top area SI & ISV with category execution excellence to win SMC-C	<ul style="list-style-type: none">Execute ISV Connect to win industry; Growth SMB through Indirect Providers
	Infrastructure \$26B	<ul style="list-style-type: none">Accelerate ACR growth with Specialized Partners	<ul style="list-style-type: none">Grow top Infra ISV ACR	<ul style="list-style-type: none">Drive Specialized workload growth (AVS, HPC, AVD)
	Digital & App Innovation \$6.3B	<ul style="list-style-type: none">Ramp SI capacity & capability to land and expand App Innovation workloads	<ul style="list-style-type: none">Win new and modernize existing GISV apps	<ul style="list-style-type: none">Win new developers on GitHub with and through partners
	Data & AI \$13.3B	<ul style="list-style-type: none">Drive SQL migration	<ul style="list-style-type: none">Focus on GSI and top SI partners to win analytics	<ul style="list-style-type: none">Accelerate Cosmo DB execution through Advance Specialization partners and GISV
	Industry	<ul style="list-style-type: none">Agree on prioritized partners by industry and geo	<ul style="list-style-type: none">Win new partner solutions & practices on Microsoft Industry Cloud for <Industry>	<ul style="list-style-type: none">Co-sell with partners across the customer journey

A15 Map

A15 Region
APAC
AUS/NZ
Greater China Region-GCR
JAPAN
Korea
INDIA
CANADA
Latin America-LATAM
Central and Eastern Europe-CEE
Western Europe-WE
FRANCE
GERMANY
Middle East and Africa-MEA
UK
US



UK Subsidiary



Clare Barclay

(clarecur)

CVP

UK CAMPUS BLD2/Mobile

UK-CORP GM



Organization: 2,781

1,898 Employees

670 Open

84 Externals

129 Interns

Reports: 13

11 Employees

2 Open



Show open positions



Show only employees



Show all reports



Alan Lewis

GM PUBLIC SECTOR

UK PS Mgmt



162 reports
46 open



Derrick McCourt

GM CUSTOMER SUCCESS

UK CSU Mgmt



654 reports
266 open



Olaf Akkerman

SR DIR SALES, RETAIL CPG

UK EC Mgmt



39 reports
14 open



Chris Perkins

ENTERPRISE COMMERCIAL L...

UK EC Mgmt



155 reports
54 open



Mark Smith

GM SPECIALIST SALES

UK SS Mgmt



630 reports
167 open



Orla McGrath

COMMERCIAL PARTNER LEAD

UK OCP Mgmt



198 reports
39 open



Craig Wellman

SR DIR SALES

UK EC Mgmt



33 reports
6 open



Max Tchapeyou

GM CONSULTING

UK - Svcs OH - Mgmt



53 reports
44 open



Soraya Scott

M&O LEAD

UK-BMO Ops



152 reports
29 open



Daniel Langton

DIR BUS OPS & PROGRAMS

UK-CORP GM



23 reports
2 open



Musidora Jorgensen

AREA SUSTAINABILITY LEAD

UK-Support Misc Items



1 reports
1 open

Thank you.