Judson Althoff, Microsoft Inspire 2021 | July 14, 2021

Chapter 1: Digital Optimism

[Opening Video – Start]

Shawn Needham, Attabotics: Automation and intelligence at the edge has given us this tremendous opportunity to be resilient and excel in the marketplace.

Shwetank Sheel, Just Analytics: From a safety and monitoring perspective, cognitive services made it much easier to develop solutions which allowed customers to do this monitoring more easily. – Shwetank Sheel, Just Analytics

Stephan de Barnes, o9 Solutions: Global logistics completely changed. Data and intelligence have been vital to keep the world moving.

Melissa Lazaro, Lexplore: It was absolutely imperative that remote learning remain accessible to all students. Technology plays such a role in creating an equitable experience in a virtual world.

John Sargent, BroadReach: We leaned on technology to support the most vulnerable populations and ensure that one health crisis did not impede our ability to continue providing support and hope to so many.

[Opening Video – End]

Judson: Good morning, good afternoon and good evening, and welcome to Microsoft Inspire. I'm really excited to share my thoughts and vision with all of you, and I couldn't be more grateful for everything that each and every one of you has done as a part of Microsoft's partner ecosystem.

We've accomplished many great things together. We've supported customers around the world, and it's been really a Herculean effort by so many of you to make sure that our customers have been kept safe during these trying times – and I really, really appreciate it. Microsoft is a company that's built on partnerships and we can't do what we do without you. Together, we operate as one. Before I jump into my remarks today, I thought I would take a moment to build upon the video that you all just saw and recognize excellence in our industry. I want to congratulate Ken Lamneck on his retirement. Earlier this year, he announced his planned succession from Insight, and I just wanted to take a moment to thank Ken for everything he has done for the entirety of the channel ecosystem. I've known Ken for a long time, both at his time at Tech Data and of course his time at Insight, and I have to say that he's represented his businesses well, but more importantly than doing so he's represented all of you and all of us incredibly well as a true statesman for the channel. Ken, thank you. You made me better. I've learned a lot from you and I wish you best of luck in your retirement.

So with that I want to move to this notion of digital optimism. And for me, digital optimism comes from the basis of having empathy for what has been as well as having hope for what will be. Look, we've been through an awful lot together as an ecosystem. Some have endured unspeakable pain. We've lost loved ones, we've lost friends, but we have all emerged stronger as a result of the same. Great wisdom and learnings can come from what we've experienced and they can and will be put to good use. I believe you have to find the positive and be the positive, and that may be easier to say than to do. And I know for some of you, it may be harder than for others, but I encourage you to choose optimism. Look, I have a belief that humanity will prevail and technology will have a role. And if technology has a role, Microsoft and its partners will most certainly have a role. Technology has

been a good servant to us as we have survived the pandemic and it will be an even greater servant to us as we thrive coming out of the pandemic. Look, whether we've recognized it or not, we've been training for this. We've been building skill at scale, readying ourselves for the future. We've been building these capabilities, whether we've taken the time to notice them or not. We've executed with real-time customer empathy. We've brought agility and innovation to most every circumstance. And we've brought new found energy in the most trying of times.

We're investing in what customers need – the Microsoft cloud, the most trusted and comprehensive cloud in the industry. Together, we will enable hybrid work. We'll bring resiliency to business through digital capability. We'll address the world's need for sustainability and we'll democratize inclusively, making sure all companies are brought along on the journey. And finally we'll provide the cyber foundation that's needed to operate securely in this digital world. Again, technology will have a role, Microsoft will have a role, and you will have a role. My first segment is about how technology will have a role and I'm excited to share with you what we're already doing today that makes me optimistic. Come along and take a field trip with me.

Chapter 2: Technology's Role

We're here at the Microsoft Industry Experience Center. It's a 22,000 square foot facility where innovation comes to life for so many of our customers and partners across a variety of industries. We hope to host you all here sometime soon so that we can brainstorm about your digital future. This setting here, however, is one that is very familiar for all of us. It's been the remote work environment that we've had to live through over the last 18 months as we've all worked through the pandemic. Microsoft's been studying this quite a bit because we believe that the same technology will empower the future of hybrid work. Seventy three percent of the workers that we've surveyed believe that they need to continue to have these remote experiences so that they can thrive and grow in their careers and at the same time have work-life balance. Sixty three percent, however, have also said that they expect to have strong collaboration and inclusivity, whether they are remote or in-person or in hybrid settings. This in fact is the hybrid paradox, and we believe technology will solve this moving forward. I'm excited to have Kiersten Robinson, the chief people officer of Ford, with me to share more about how Ford is thinking about hybrid work.

Judson: Kiersten, thanks so much for joining me today.

Kiersten: Thanks so much Judson. It's great to be with you.

Judson: So Kiersten, why don't we start off with how Ford is thinking about hybrid work all-up and how you think technology will have a role in your strategy?

Kiersten: We've been on quite the journey for the last 12 to 18 months and we've spent much of that time listening to our employees and learning how to modernize the way we work, and rethink and reimagine the evolution of work. And the hybrid work model is at the center of that for many of our employees. And so the way in which we're thinking about this is as we engage our employees from around the world, "What are those tools and technologies that are going to best enable them to work productively wherever they are, whether that's at home, in a coffee shop, or coming into the workplace?" And the workplace is going to be very special. It will have a specific purpose around collaboration, innovation, community and wellbeing. And we can't bring any of that together without the right technology, collaboration tools and the power of the cloud.

Judson: Hey, thanks so much for sharing that with us, Kiersten. We're really proud of the work that we're doing together, and I think it's awesome how Ford is incorporating such a people-centric approach towards hybrid work. We're going to share a little bit more about how to bring this to life, and I'm here with Leah Stevens. Leah, welcome.

Leah: Thank you.

Judson: Thank you so much for being here. You work here in this awesome Industry Experience Center and also in our Executive Briefing Center, and you're responsible for designing so many of these cool spaces. So why don't you take it away and share with us about how we're going to bring some of these experiences to life?

Leah: Absolutely. Thanks Judson. So when we talk about hybrid work at Microsoft, we're talking about a lot of different solutions – everything from Teams and Viva, to securing endpoints, to Windows 11. But mixed reality has to be a part of that conversation. A few months ago, we announced Microsoft Mesh, which enables shared experiences from anywhere, on any device, through mixed reality applications. With the magic of Mesh, here is anywhere – and the possibilities are endless. And we're seeing our Microsoft mixed reality partner ecosystem really lean into this idea of mixed reality and AI coming together to transform the way we work and collaborate. So today I'm excited to be using HoloLens 2 and a remote collaboration app from Spatial, a Microsoft mixed reality partner. Spatial's platform creates virtual spaces that bring people together, and integrates with the entire Microsoft stack for optimal productivity and collaboration. It also leverages a suite of Azure capabilities from cognitive services for real-time transcription and translation, to spatial anchoring for hologram interaction. Teams-enabled virtual rooms from Spatial are helping bring people together anytime, anywhere. And I've invited Jennifer Kolstad, global design director at Ford, to join me in Spatial and share more about how they're bringing hybrid work from ideation to execution. Jennifer and I have already created our avatars by uploading a 2D headshot into Spatial's app to create our 3D selves. So let's jump in.

Leah: Hey, Jennifer, it's great to see you. Thanks so much for joining us today.

Jennifer: It's my pleasure. Thanks very much for inviting me in.

Leah: So at Microsoft we're taking a very data-driven approach to the future of hybrid work. And in my role, that really means thinking about how we build hybrid experiences for both customers and partners here at the Industry Experience Center. And you've been leading some very interesting work with Ford's Think Tank around the future work for Ford employees, both from the physical spaces that you build to the culture change that you drive. So tell me a little bit, what are you learning from these findings and how are you incorporating that into your workplace designs?

Jennifer: Well, we've learned that it's a complicated question. So at Ford Motor Company, we had the opportunity to generate a Think Tank, as you mentioned, and we invited in a lot of experts on the topic – internal and external to Ford – and together we've landed on a hybridized future. And this is really describing a decentralized ecosystem and an asynchronous workstyle. All that is saying that this is about individual choice. Those experts that I mentioned came together and in our discussions, what we landed on were nine guiding principles describing future of work, and those principles are really intended to guide our decisions as we move forward.

Leah: Absolutely. And I think there's something very interesting here that I just want to touch on, and that's this idea of phygital experiences.

Jennifer: Thanks for pulling this up. Phygital usually gets the attention of our audience because it's a new, funny word, but what it's describing is the new workplace continuum. It's really the combination of physical with digital space. It means that those who are present have an equal opportunity to be productive with those who are not.

Leah: Absolutely. What are some of the ways that you're seeing digital being layered into your physical spaces?

Jennifer: So we're designing some new attributes specifically with our new world headquarters in Dearborn, but in other places too, like in Chennai, Sao Paolo and Shanghai. So we've got components that we're thinking about, like what we're describing as the “newsstand.” I think you've got a picture of that right below the principles. A newsstand is intended to be a combination of analog and digital information, so it's a place where people gather and pass through. It's a share-out of internal and external information, but it's really a community-building mechanism.

Leah: I love that. And in fact, that's something I would love to share with our team here at the Industry Experience Center. Just going to make a quick note: “Newsstands for the Industry Experience Center”

Jennifer: I love that, Leah.

Leah: So Jennifer, I see you've actually dropped in some visuals of what these new spaces will look like. Let me pull this model closer so we can take a better look. Can you tell me a little bit more about what we're seeing here?

Jennifer: You're looking at one of our international floor plans. This one is Shanghai, but this was us test-fitting the principles that we extracted from Think Tank and applying them to our global assets. So we did the same for Chennai, we did the same as well for Sao Palo, and we're applying yet the same principles to The Hub, which is 2 million square feet affecting 10,000 people, day one. So what you're seeing here in China is really about us understanding how we can better equip an existing floor plan for a new working model. Again, decentralized work, asynchronous work styles, choice and encouraging people to work differently. So what previously resonated as desk-for-work is now more about moving, posturing and wellness. In other words, collaborative work happens in new and different ways.

Leah: Jennifer, super smart. Really, really can't wait to see these spaces come to life. Thank you so much for being with us today and sharing some of the insights that you have driven with the Think Tank at Ford. Can't wait to see them brought to life.

Jennifer: You're so welcome. I can't wait to invite you to the new Dearborn campus.

Leah: Looking forward to it. Awesome, thanks Jennifer. Back to you Judson!

Judson: Thanks Leah. In addition to the challenges of hybrid work and the concerns of empowering employees, nearly every CEO has been concerned about the global supply chain and providing some resiliency to their supply chain strategy all-up. Certainly technology has a role, whether it be navigating the pandemic or solving for the compromises of the Suez canal. FedEx has been at the center of making sure that people get what they need, when they need it, and where they need it. I'm delighted to have Raj Subramaniam with me here to share more about how FedEx is thinking about data being at the core of the future of global commerce. Raj, welcome.

Raj: Thank you, Judson. It's great to be here.

Judson: So, Raj, why don't we start by you sharing a little bit more about how FedEx is revolutionizing the future of the supply chain and how technology will have a role.

Raj: At FedEx, our core purpose is to connect people and possibilities around the world – and this has never been more critical than through the last year and a half. We have been reinventing the future of FedEx at the intersection of physical and digital networks. You know, we know that bringing these things together brings real value to our customers and the global economy. Now over a year ago, we announced FedEx Surround with Microsoft, allowing enhanced near time visibility into goods moving through the supply chains. Now, in addition, predictive analytics drove more precise logistics and inventory management. We believe technology and digital innovation are hallmarks for success in the future, and we are on a journey to unleash new value through the insights that we have in our network.

Judson: Thanks so much, Raj, and thank you to the more than 600,000 frontline workers at FedEx that have done so much for so many around the world during these challenging times. I'm excited to have Morgan Winter here with me. Morgan is our resident expert on how all of this FedEx technology works. Morgan, take it away.

Morgan: Thanks Judson. So in today's global marketplace, a shipment from point A to point B is rarely linear and in a crisis like a natural disaster, global pandemic, or even a blocked canal, having real-time visibility into the entire supply chain is key to making informed decisions. And that is exactly what FedEx is doing with FedEx Surround. An ecosystem of experienced partners like Infosys and Infogain are helping FedEx and Microsoft bring this vision to life by supporting the platforms, development and operations performance. FedEx Surround processes scan data, transportation data and sensor data, and through Microsoft's intelligent cloud and AI services, they're working to layer in global commerce conditions, such as weather and traffic patterns, to take this near real-time monitoring to the next level. They're helping customers and FedEx Experience Agents with predictive capabilities to intervene before a problem occurs. Early development of FedEx Surround was happening in parallel with one of the biggest landmark moments in FedEx history – and that was delivering COVID vaccines around the United States. The reality of COVID vaccines on the FedEx network was a 500% increase in daily shipments that required priority management. On any given day there are thousands of vaccine shipments moving through their networks. The platform translates various datasets into robust insights on user-friendly dashboards for customers and priority alert agents. Surround's advanced monitoring and intervention capabilities allow for agents to pinpoint where delays might be occurring in real-time down to individual shipment levels, giving teams as much time as possible to take action. Let's take a closer look to better understand FedEx's vision and what an urgent health care shipment's journey could look like in FedEx Surround. Here, we can see the initial scan from a hospital sending temperature-controlled patient samples from Memphis to a lab in New York overnight for urgent

diagnostic analysis. The shipment is enabled with FedEx SenseAware technology. In addition to scan data, the SenseAware device gathers real-time information at the individual shipment level on exact location and temperature. We can see that the packages containing the patient samples are loaded into a plane at the FedEx World Hub in Memphis. However, shortly after departing, the plane encounters a severe storm on its route, and we can see that it's forced to divert to Pittsburgh causing a potential delay. Surround detects that the shipment is at risk for delay and triggers an alert. This is where FedEx Customer Experience Agents request an expedite in accordance with the customer's pre-established preferences. Status updates are visible like this to the customer on the Surround portal, providing real-time updates when intervention has been initiated and completed. Throughout transit, SenseAware continually monitors the temperature of the package, ensuring the delivery stays within the prescribed range. If the temperature begins to near the upper threshold, SenseAware triggers an alert for the operator to re-ice the package while stopped along the way. And good news is, we can see that the shipment reaches its destination in New York with all of the patient samples protected. This is just one possible example of the approximately 20 million shipments moving through FedEx's system every day, but it illustrates both the necessity and value of Surround to bring increased intelligence and clarity to today's supply chain complexities. Back to you, Judson.

Judson:
Thanks Morgan. While no supply chain is 100% resilient, it's true that digital supply chains or those fortified with digital capability are more resilient than those that are not. In addition, not only do they solve for the bottom line and the top line, they can actually help address sustainability challenges, because whilst we become more efficient, we also reduce the carbon footprint. We reduce the amount of water that is wasted in the process, and we can address the sustainability challenges that the planet faces. Coming out of the pandemic, it will in fact be the biggest problem that the world faces all-up. Whether it be a manufacturing process or a complete factory or the entirety of a supply chain from left to right, digital twins and digital capability can help address the sustainability challenges of the planet. I'm delighted to have William Lin from bp with me here, because bp has been on the forefront of solving for sustainable energy challenges around the world. William, thanks for joining me.

William: Thanks Judson. Thanks for having me.

Judson: So William, tell us about the role technology is playing in the energy transition at bp.

William: We have declared our new purpose of getting to net zero by 2050 or sooner and helping the world get to net zero as well. Digital is sort of the underpinning of everything, and we're working very closely with Microsoft in developing technologies that allow us to do that through digital twins. And how we optimize value, optimize margins, but also reduce emissions, is where I think the power of our partnership really lies. Together, we're going to co-create and co-innovate new solutions that we then can help other entities decarbonize on their own net zero journeys – so as we expand our digital footprint, so to speak, cybersecurity is a critical risk. We're investing a lot of time, resources, capability, and strengthening these barriers in technology and working with partners like Microsoft to help us do that.

Judson: Thanks William. By leveraging our complementary skills and our partnership together, we're not only helping one another reach our net zero goals, but we're helping billions of people around the world. As we decarbonize the planet, we couldn't be more thankful for the partnership. And in fact, bp is really essential to helping Microsoft lower the carbon footprint of its own data centers. So

thanks so much, William. So I'm delighted to be here with Andy Pratt. Andy, you've been working really closely with bp. Why don't you show us a little bit more about the technology behind the scenes here.

Andy: Super. Well, thanks for having me, Judson. Let's go on a bit of a journey through some of the incredible work that bp and Microsoft are doing together, powered by a whole host of partners from across the ecosystem. So first let's start by bringing up a digital representation of bp's operations around the coast of the U.K. I'm going to be following along here on a digital twin app. So to really go after what we're looking to do as a planet and as a species, we need to be able to change how we generate, how we distribute, how we consume power all-up. Let's go and take a look at some of this technology. So, first of all, heading over to the wind farms off the coast of the U.K. Here, bp have the opportunity to use some of the amazing work they're already doing with real-time telemetry, connections on the edge, security, to bring tens of thousands of data points from these wind farms. So as we look here, we can see air flow across the facility. We're seeing predicted weather conditions to understand how to optimally set up the wind farm to utilize well. Some of these critical sensors are giving us feeds to understand vibration issues, potential changes in torque, behavior that we don't want to see – all of this enabling to really understand the health of the asset, how it's operating, and what we can do about making sure that it is operating as efficiently as possible. And these kinds of alarms are critical to cut through the noise of the data that people often see and really be able to get right to the key actions to make the right kind of decisions that are going to keep people safe, and the assets operating well. However, one of the big challenges is that without physically being there in these remote and harsh environments, how can we really understand the full health of the asset? Traditionally, we'd often have to do very dangerous and time-consuming inspections with people where they literally have to climb up on to the windmills and look and inspect all of the blades. Here, we can deploy drone technology, utilizing LiDAR, thermal imaging, some of the advanced optics to inspect every inch of it in a matter of minutes when it used to take days, and really understanding what's happening beneath the surface of the blades. These capabilities can really help remote operations teams, mean that when the wind is blowing, we're generating sustainable energy for the grid. Let's go and take a look at some of the technology that they're also using to reduce their current operations emissions. So here you can see a representation of the Clair Ridge. It's a huge asset, massively complex. The areas I'm highlighting right now is where power is generated for use in the facilities. Over here, you can actually see where all of the different pumps and infrastructure that's currently drawing energy from this power generation to deliver the value. However, how to know what to turn on, what to turn off, how much to run it, what pressures in this changing environment while still meeting safety and production standards, is a massively complex problem. In this twin, we're bringing together hundreds of billions of data points real-time. We're extracting key information from structured and unstructured documents like maintenance records and audits using partners like Cognite to bring that data into context, using incredible capabilities from Ansys and the simulation teams there to really understand the physics of what's happening and how that compares to the real world. Bringing all of that together so that the operations team can get to the right insights, the right decisions. You can see the, how critical these assets are. And so the end to end security is just absolutely essential. Being able to use some of the latest investments, to ensure we're constantly analyzing for threats, constantly adapting to changing threat vectors and making sure that this critical data is streaming securely to the operations and back to the facilities. It's actually incredible to think how this optimization technology and the security and technology can have an amazing impact on our vision for cities also. So let's go and take a look at what's happening in the cities and how this technology can be applied. What's really interesting is how power is changing and the challenges that brings. So traditionally we would generate in one central or central large places

and then distribute to the consumers. Now we're living in a world where everybody can be producing power, storing power, distributing power. The cities can have E vehicles used as storage. We can have consumers with solar panels on the roof, businesses changing how they optimize their HVACs and AC systems to make sure they're minimizing their impact. But if we could connect this whole ecosystem together, securely, in one central place, we would be able to provide optimizations of the end-to-end network. These are just some of the exciting things that we're seeing materialize now, and are excited to keep investing in the future. Judson, thank you so much for having me.

Judson: Thanks, Andy. So when I talk about digital optimism, I do it with a great sense of humility because the reality is we're not out of this pandemic until all of us are out of this pandemic. And one of the greatest challenges we'll face around the world are the recovery of small businesses and the need to make sure that they're empowered with technology. They need the same technology that empowers Fortune 500 companies around the world, but have the challenge of compressed budgets and the need to solve problems at scale really without the same kind of resources that many of their larger competitors have. So I'm delighted to share with you how AB InBev is tackling this problem, head-on. David Alameda is joining me here. So David, let's start by hearing more about how AB InBev is helping small businesses across your entire ecosystem.

David: So Judson, these small customers are critical to us. Over 6 million small businesses around the world, they are a big portion of our business, but more importantly, we're a big portion of theirs. And these customers are struggling, right? They're competing against big competitors in big box, e-commerce. They don't have the scale to develop the tools they need to win. And we're bridging that gap. We're bridging that divide to provide them the digital tools that they need such as digital ordering. So instead of having to deal with 15 different sales reps, they can provide their orders digitally; such as things as algorithms that are recommending to them the items they need in their store, and at what price they should sell them to maximize their sales; and then things like credit, right? So before, you know, in order to get working capital, they had to, you know, struggle to go expand their businesses. Now we're providing them that working capital at affordable prices to help them grow. So this is just the beginning. There's a lot of things that we can add, right? But we're absolutely focused. We understand that their success is our success and we're focused on addressing the pain points they have to help their business grow because we know that if theirs grows, ours will as well.

Judson: Thanks, David. We're grateful to be partnering with AB InBev, and I'm super proud of all of the things you're doing to embrace inclusivity for small businesses and really democratizing the entire experience. We're going to show a little bit more about how the technology works and my friend, Todd Minor here, is going to help out. Todd, thanks for being here with me.

Todd: I'm excited to be here. Thanks for having me.

Judson: So Todd is not only the fearless leader of Microsoft Sales Academy, but he's also a small business owner himself. He and his wife own Nana's Southern kitchen, and I have to say it's pretty fantastic, Todd.

Todd: Absolutely.

Judson: Well, listen, I'm going to hand it over to you and let you show off the technology here.

Todd: Thanks so much for having me. As you said, economic empowerment for organizations and individuals is super important to me and I couldn't be more excited to showcase empowerment in action by sharing all the great work that AB InBev is doing to serve small businesses throughout Latin America, including this shop right here in Brazil. And now they have an ecosystem of partners supporting them like Cumulus and Everis throughout the delivery of dev ops, security, data analytics capabilities. Even before the pandemic, 80% of these businesses tended to fail in year two or three. And despite being a global company, 95% of what AB InBev produces is actually produced and sold locally. AB InBev has curated a digital marketplace to help small businesses save time and money by providing a one-stop shop for a range of goods. These marketplaces are revolutionizing the food and beverage industry in Brazil by helping supermarkets, restaurant and bar owners purchase goods at the lowest possible price, as well as easily place orders, transact payments and even track inventory, as well as ordering history, all in one convenient e-commerce application. For many businesses, purchasing power starts with securing access to reliable financing, but the unpredictable and sometimes volatile nature of these businesses can make funding a challenge. Today, there are roughly 1.7 billion people, almost 20% of the global population, without access to any kind of formal financial system. These individuals we call “unbanked.” AB InBev is developing solutions like Donus that helps small businesses connect with fair credit lenders through financial technology solutions. Donus offers SMB owners digital bank accounts directly integrated with their POS machines, along with no-fee debit cards and cash offers for marketplace purchases. SMB owners can use Donus’ smartphone app to monitor transactions, access funds that are placed in their digital wallet. Donus also provides fair credit lending specialized for small businesses through low-rate micro loans funded directly by ABI. Donus' algorithms analyze historical merchant data to determine the appropriate funding and avoid high-risk lending. Small business owners are shown preapproval figures and can select the loan terms that best meets their needs. Once the terms are selected, Donus processes the information and the funds are distributed in the SMBs owner's account in two to three days. The company believes that when these communities are economically thriving, it benefits all of us. Today 80,000 small businesses are using Donus' services to secure critical funding to keep the doors open. And they are just getting started. Back to you, Judson.

Judson: Thanks Todd. So when I think about what lies ahead for us all, I get really excited. I do have a sense of optimism and it's because we can do this. If you think about it, we actually have been doing it all along. The same technology that has helped us survive the pandemic will, in fact, help us thrive coming out of the pandemic as a society. So whether it's the challenge of hybrid work, the future of supply chains around the world, tackling sustainability and doing it inclusively so that we democratize the experience for all, be sure that technology will have a role. And if technology has a role, Microsoft will have a role. Let's head back to the studios.

Chapter 3: Microsoft’s Role

Empowerment is at the core of our mission. We are at our best when our technology is the servant of our customer's business. Together as a partner ecosystem, we have been on the forefront in helping customers with their digital transformation for many years. We were early in embracing the fact that companies, customers and partners needed to digitally transform. We've learned a lot along the way. We've learned that it requires a bedrock of technology across a number of different facets, and that's why we've invested in the breadth of our portfolio and our six solution areas**.** The four scenarios I shared earlier, all composed from our modern work capabilities, our business applications, our cloud infrastructure, our digital and app innovation that we bring to developers, our data and AI platforms,

and of course, it's all built upon the foundation of cybersecurity. There's partner opportunity across all of these discreetly and uniquely as a whole.

We know that it takes an open, integrated and trusted cloud – the Microsoft Cloud – to deliver on digital transformation. We've also learned that no two digital transformations are alike. Customers by different industries need different solutions, and so we must compose these uniquely. That's what we've done with the Microsoft Cloud. We're verticalizing the Microsoft Cloud to deliver differentiated value by industry. The Microsoft Cloud for financial services, healthcare, manufacturing, nonprofit and retail all provide differentiated value that leverage all assets of the Microsoft Cloud. They're what our customers expect of Microsoft, and building upon this expectation earlier today, Satya announced the Microsoft Cloud for Sustainability. This new platform is designed to help companies take control of their environmental impact. It enables any organization to more easily and effectively record, report, reduce and replace their emissions. This provides yet another opportunity for partners to build upon the promise of digital transformation in service to the planet. It will take all of us working together to make this a reality, and I'd love to share this video with you to express just how excited we are about this new opportunity.

[Sustainability Video – Start]

Mads, Orsted: The single biggest challenge humanity is facing is the climate change that is threatening all parts of the globe.

Christophe, Ecolab: We need solutions ultimately to address water and climate, which are very interlinked, so we can solve both of them at the same time.

Lydie, Credit Suisse: We're operating in an environment where the data and information is highly fragmented and in some cases very immature, and the regulatory environment for how we do business is embryonic and highly unstructured as well.

Huibert, Shell: But the greatest challenge is actually how the world makes real and lasting change to its energy system at the speed and the scale that is needed.

Teddy, Land O' Lakes: We're thinking about it from an agricultural perspective and the impact on the overall food fuel and fiber supply chain.

Evan, Nasdaq: As an exchange operator, the idea of a shared ecosystem is very familiar to us. Bringing buyers and sellers together, bringing information providers and information consumers together, is essential to solving the climate crisis.

William, bp: It's a complex system putting supply and demand together, and then building the infrastructure and the systems that connect supply and demand. It is an ecosystem. It is each company bringing its core capabilities together.

Christophe, Ecolab: Most companies have set very ambitious goals. At the same time, very few companies have solutions on how to get there. The Microsoft Cloud for Sustainability can be game changing.

Teddy, Land O' Lakes: I think it's going to be really interesting to have sort of a framework to be able to figure out exactly how as an organization, you want to be able to measure your efforts on sustainability.

Huibert, Shell: The value really comes back to data. If a company really wants to step up its environmental ambitions, then it needs to be able to track its progress, to monitor how we're actually doing real time.

William, bp: They ability to be able to track emissions, to know how much CO2 you're emitting, and how much you're able to abait. And then to be able to then stand behind that and be able to say that that's auditable will become critical.

Lydie, Credit Suisse: And Microsoft have a tremendous opportunity to be a part of creating consistency and a way in which other organizations can consume and understand information in a way that then can be compared and understood to ultimately achieve our sustainability and net zero ambitions.

Evan, Nasdaq: I think there's lots of innovation in this space. We're finding new ways to tackle old problems. I'm confident in our ability to marshall technology, marshall data and come up with solutions that are going to help fix this problem.

Mads, Orsted: I believe that the human resolve, technologies and ingenuity and passion together will make us land with a planet that we are proud to hand over to the future generations.

[Sustainability Video – End]

The Microsoft Cloud is the most trusted and comprehensive cloud. It enables Microsoft partners to provide differentiated value across all solution areas and uniquely by industry. Because again, if technology has a role, Microsoft and its partners will have a role – and a role like no other – because we're the only company and the only partner ecosystem that can deliver this value from left to right. So next, you're going to hear from Nick Parker, and I'm excited about what he's going to share with you because he's going to share why Microsoft is the best partner for all of you. He's going to talk about the growth opportunities that exist by solution area and encompassing the Microsoft Cloud, and he's going to talk about how we're investing for your success and our path forward.

Chapter 4: Your Role

I need to express to you all, just how grateful I am to all of you. Microsoft was built by partners, for partners, and always will be with partners. As many of you know, we announced the coming together of our commercial business teams around the world into a new organization we call Microsoft Customer and Partner Solutions, and there was deliberate intent in including the word partner in our name. When the new leadership team got together, we talked about it and everyone to a number felt that it was super important for us include partners to signal our commitment to all of you and make sure that you all understand that we will do everything together moving forward. You have my commitment to make this real. Anything we do in market together – win, lose, or otherwise – we'll do with partners. I'm excited about what lies ahead and the opportunity that we have moving forward.

Today, I've shared a lot with you about my own view of optimism, and digital optimism, as I call it. I hope that you share this passion as well because it's going to take all of us to help the world come out of this pandemic, help it come out with new-found energy and serve this community only the way in which Microsoft and its partners can. You are the very best, the very biggest and the most capable partner ecosystem in this entire industry. And I'm excited to bring my best with all of you to make a difference in the world.

[Closing Video – Start]

Shantuanu, Adobe: Digital has always been the tailwind that we have relied on to transform every part of human lives.

Garish, Blue Yonder: Technology is today's table-stakes. It is a basic human service, moving from being a perk to being a utility.

Carmine, EY: Technology is critical in terms of the world's recovery. It's at the CEO and chairman level of all organizations.

Christian, SAP: We have seen companies rapidly change their business models.

Michael, Dell: We're hearing that they're accelerating, right? Their three-year plans were done in three months.

Julie, Accenture: They're taking on compressed transformation and they're doing so not only to be better for their customers or clients but also for their people and their communities.

Ken, Insight: The clear winners are the cloud, and certainly Microsoft has done a phenomenal job in that area. The Microsoft offerings are differentiated, really. When you look at it, they're really addressing everything from the edge all the way to the cloud.

Garish, Blue Yonder: Microsoft Cloud stands apart from the other cloud providers. It's an unbiased cloud, offers us the components, the enabling tools.

Shantuanu, Adobe: It's not just the technology platforms, it's the ubiquity of solutions.

Michael, Dell: Microsoft has a strong, open and enormous ecosystem full of amazing innovation.

Julie, Accenture: And we as the ecosystem partner network are the sensors that not only bring the value to the client, but also can provide Microsoft with the important input they need so that they can continue to change and meet our client's needs.

Shantanu, Adobe: The ability for us to jointly innovate and deliver dramatic value to our customers is incredible.

Christian, SAP: The pandemic has shown that we can create massive change in a very short period of time, and I'm convinced we can make this change last when we do it jointly.

Michael, Dell: Across our customer base in general, right now, what we're seeing is a lot of optimism. There is tremendous growth to be had over the next couple of years, so our clients are really up for that.

Ken, Insight: I believe the next 10 years will be the most exciting years for the industry.

Michael, Dell: And so I'm super excited about our future, about building new businesses together and about the positive impact that we can collectively make in the world.

[Closing Video – End]