

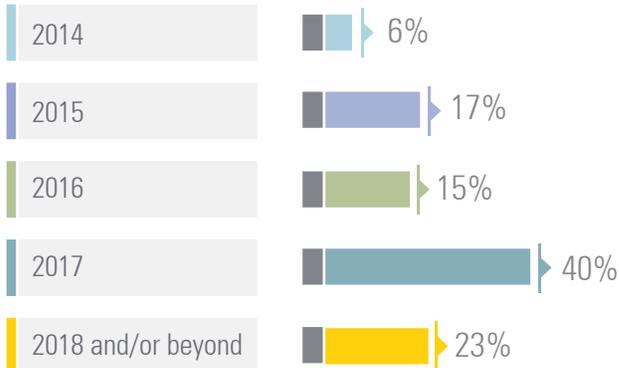
SURVEY OF TECHNOLOGY CHIEF EXECUTIVES IN THE UNITED STATES

KEY FINDINGS



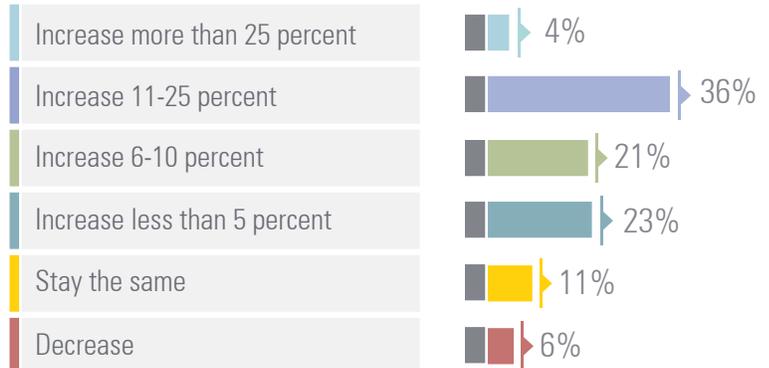
PROSPECTS FOR GROWTH

When greatest profits in the next five years



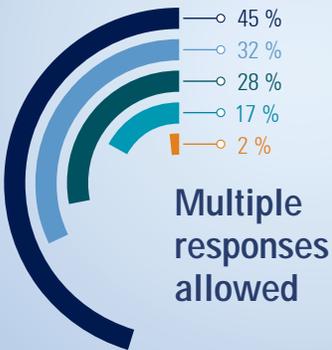
[Total-100%]

Headcount change in the next three years



[Total-100%]

MORE CLIENT AND CUSTOMER CENTRIC?



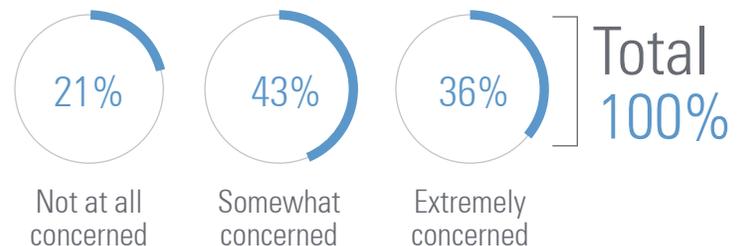
- Training junior staff sooner so they can interact more regularly with customers
- We have not changed our customer strategy at this point, but are planning to
- Charged senior leadership to invest more time personally with customers
- Spending significantly more face time personally with customers
- This is not a priority for us



CONCERNED ABOUT COMPETITORS?



CONCERNED ABOUT PRODUCT RELEVANCE?



percentages may not sum to 100% due to rounding