



***Re-Imagining
~~Enterprise~~ Computing =***

***Changing Business Process
One Segment at a Time***

Tweet from Aaron Levie...



@KPCB

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*While Consumer Internet Entrepreneurs
Often Pursue
Personal Passion...*

*'Enterprise' Internet Entrepreneurs
Often Pursue
Prior Company Pain Points*

Business Communications... Slack – Stewart Butterfield

THEN

Email / Semi-Inflexible Messaging Tools



NOW

Slack



Can reduce internal email traffic materially

Offline Payments... Square – Jack Dorsey / Jim McKelvey

THEN

Difficult to Set Up /
Process Offline Payments



NOW

Square



Allows merchants to accept credit card payments via their existing
smartphone or tablet & run a sophisticated point of sale system

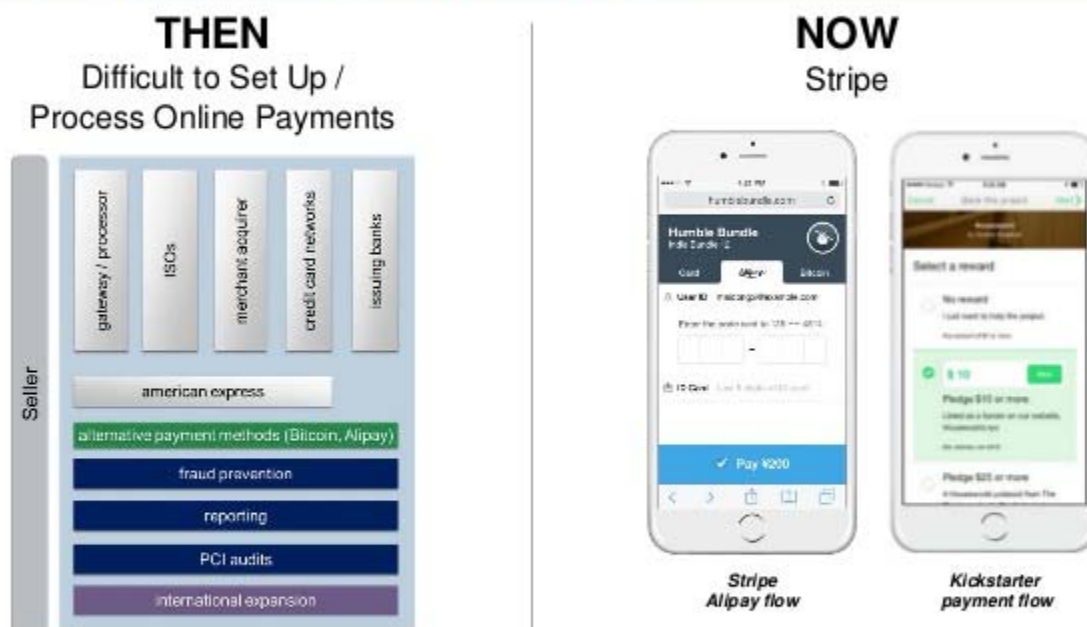


Source: Square. Image: Square (left and right).

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Online Payments...

Stripe – Patrick Collison / John Collison



Can dramatically reduce payment integration time for developers and allow them to take advantage of modern APIs, compared with time required to deploy traditional merchant account

Business Analytics... Domo – Josh James

THEN

Data Overload Without
Easy Access for Execs



NOW

Domo



Improved access to real-time data can help users save time
& improve decision making

@KPCB Source: Domo. Image: Omniana (left), Domo (right).

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Document Signing / Transaction Management...

DocuSign – Tom Gonser

THEN

Paper-Based Signatures



NOW

DocuSign



Can reduce transaction costs & improve transaction times



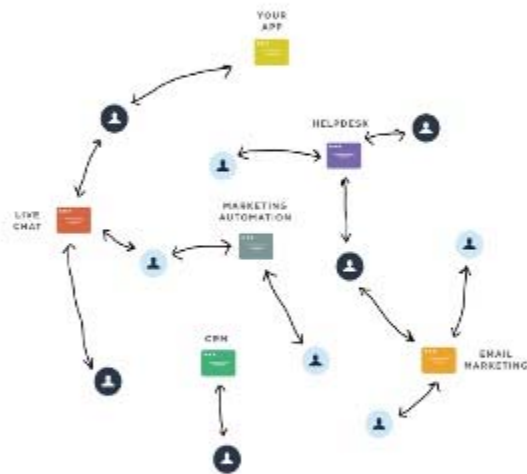
Source: DocuSign. Image: Good Marketplace (left), PaperlessChase.com (right).

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Customer Communication... Intercom – Eoghan McCabe

THEN

Disconnected Point Solutions



NOW

Intercom



In-app messages can be more engaging (based on reply rates)
than traditional email marketing products

Customer Success... Gainsight – Nick Mehta

THEN

Transactional Sales
Process with High Churn



NOW

Gainsight



Typically improves net revenue retention

Customer Service... Directly – Antony Brydon

THEN

In-House Support Center



NOW

Directly



Can reduce customer response times & improve customer satisfaction

@KPCB Source: Directly. Image: JaimeOrtega.net (left), Directly (right).

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Human Resources... Zenefits – Parker Conrad

THEN

Paper Files &
Insurance Brokers



NOW

Zenefits



Manages \$700MM+ in annual benefits premiums across 10K customers in 48 states
vs. traditional brokers which typically work within a single state



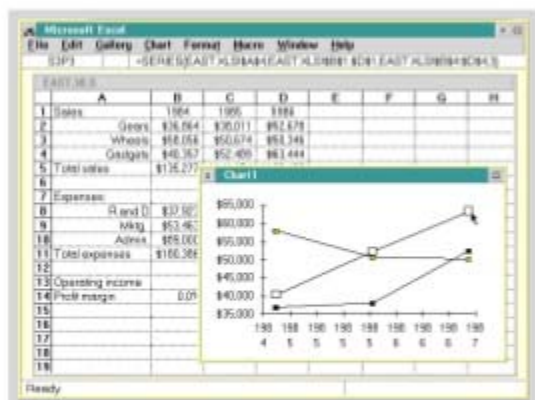
Source: Zenefits. Image: McNayer (left), Zenefits (right).

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Enterprise Planning & Performance Optimization...

Anaplan – Frederic Laluyaux

THEN
Microsoft Excel



NOW
Anaplan



Can improve ROI for customers that have replaced
legacy planning solutions & spreadsheet-based processes

@KPCB Source: Anaplan. Image: The Otago (left), Anaplan (right).

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Recruiting... Greenhouse – Daniel Chait

THEN

Reactive / Complex...
Only Used by Recruiters



NOW

Greenhouse



Can improve time-to-hire & decrease overall hiring costs



Source: Greenhouse. Image: Market Wind (left), Greenhouse (right).

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Background Checks... Checkr – Daniel Yanisse

THEN

Manual / Time Consuming Background Screenings



NOW

Checkr



Typically reduces background check turnaround times



Source: Checkr. Image: National Federation of Independent Business (left), Checkr (right).

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Employee Knowledge / Training... GuideSpark – Keith Kitani

THEN

Static Hardcopy Manuals



NOW

GuideSpark



Can reduce Human Resource support time &
increase employee benefits plan participation



Source: GuideSpark. Image: GuideSpark (left), GuideSpark (right).

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Visitor Management... Envoy – Larry Gadea

THEN
Sign-In Sheets



NOW
Envoy



Over 1MM visitors checked-in across 1,000 companies worldwide since May 2013



Source: Envoy. Image: APT Research (left), Envoy (right).

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*Ten Years from Now,
When We Look Back at
How This Era of Big Data Evolved...*

*We Will Be Stunned at How
Uninformed We Used to Be
When We Made Decisions*

– Billy Bosworth, DataStax CEO (2015)

... 'Just in Time' Products + Services = Enabled by Mobiles + Sensors + Humans

Selected On-Demand Company Fulfillment Time Estimates

Transportation	Food	Delivery
 ~10 min	 <20 min	 Typically within 1 hour
 Within minutes	 Typically within 1 hour	 ~20 min
 Within minutes	 Typically within 20-40 minutes	
Dining		Travel
 Instant booking	 15 min	 Instant booking
		 Instant booking
Entertainment	Groceries	
 Instant booking	 Typically within 1-2 hours	

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Source: Statements from company and publicly available information.

Note: Fulfillment time for transportation companies and Shyp is defined as wait time until pickup. Fulfillment time for food companies, Instacart, and Postmates is defined as time until delivery of goods. Fulfillment time for the remaining companies is defined as time until completion of the transaction.

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