

# Ohjelmistoliiketoiminnan paneeli: Kuinka iso pitää olla, jotta pärjää?

Jyrki Kontio, Ph.D.

# Panelistit

- ▶ **Jari Jaakkola**, toimitusjohtaja, QPR Software Oyj
- ▶ **Timo Kanninen**, toimitusjohtaja, Biocomputing Platforms Oy
- ▶ **Pyry Lautsuo**, TTL:n hallituksen puheenjohtaja, hallituksen jäsen (Webropol Oy, SSH Tectia Oyj, Affecto Oyj)
- ▶ Puheenjohtajana **Jyrki Kontio**, R&D-Ware Oy, konsultti, hallitusammattilainen

## Toimialan sisäiset haasteet

1. Myynnin ja markkinoinnin puutteet (1)
2. Pieni yrityskoko (2)
3. Markkinan ja asiakkaan heikko tuntemus
4. Kasvustrategian muodostamisen vaikeus

”suomalainen ohjelmistoyritys keskimäärin on hyvin pieni. Lähes puolet (45 %) yrityksistä on alle viiden hengen yrityksiä”

Kasvufoorumi 08:n loppuraportti

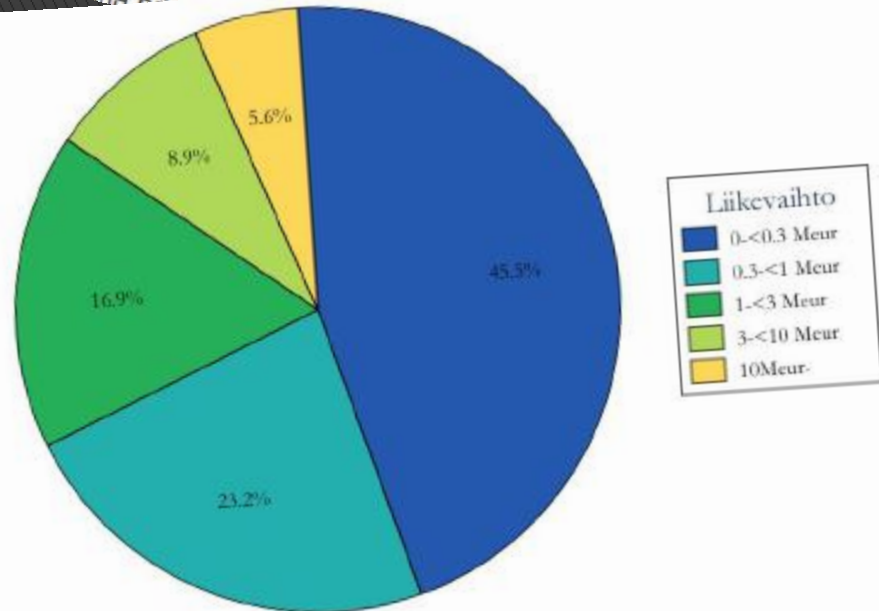
”Ohjelmistoyrityksiä pitäisi pyrkiä kasvattamaan 5–10 miljoonan euron liikevaihtoluokkaan, jotta kansainvälisetkin sijoittajat näkisivät ne potentiaalisina rahoituskohteina”, Pekka Pere, pääomasijoittaja

## Suomalaiset ohjelmistoyritykset ovat liian pieniä ulkomaisille sijoittajille

Suomalaiset ohjelmistoyritykset ovat liian pieniä kiinnostaakseen ulkomaisia sijoittajia, kertoo **Ohjelmistoyrittäjät ry** tiedotteessaan.

”Jotta ohjelmistoala saadaan kansainväliselle kasvu-uralle, tarvitaan merkittävästi nykyistä suurempia pääomia ja suurempaa yrityskokoa”, sanoo Ohjelmistoyrittäjät ry:n hallituksen jäsen **Mika Ahokas**.

Julkisella innovaatiojärjestelmällä tuetaan yrityksiä erityisesti niiden alkuvaiheessa, kun taas yksityiset pääomarahoittajat eteis-



# Pienuudesta johtuvia ongelmia

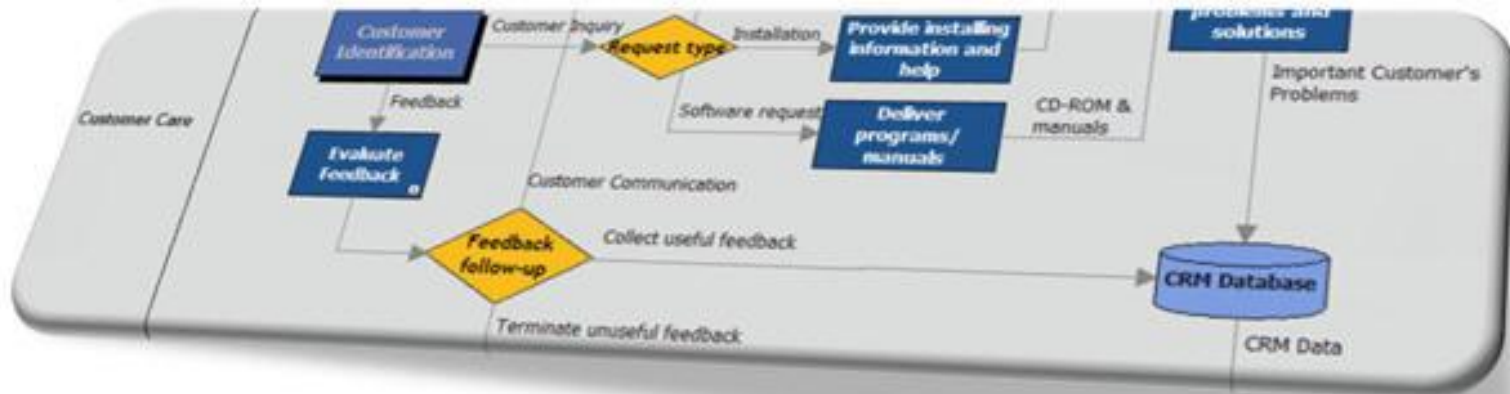
- ▶ Rahoitusta on vaikea saada
- ▶ Asiakkaat ostavat vain isoilta
- ▶ Investointeja on vaikea tehdä
- ▶ Nopea kasvu aiheuttaa resurssiongelmia

# IT-ala on poikkeuksellinen

- ▶ Kallasvuo:
  - ”ohjelmistoala on siitä poikkeuksellinen, että siinä voi olla maailman luokan menestyjä, vaikka yritys olisi pieni”
- ▶ Esimerkkejä:
  - QPR Software
  - Biocomputing Platforms
  - Webropol
  - SSH
  - ...

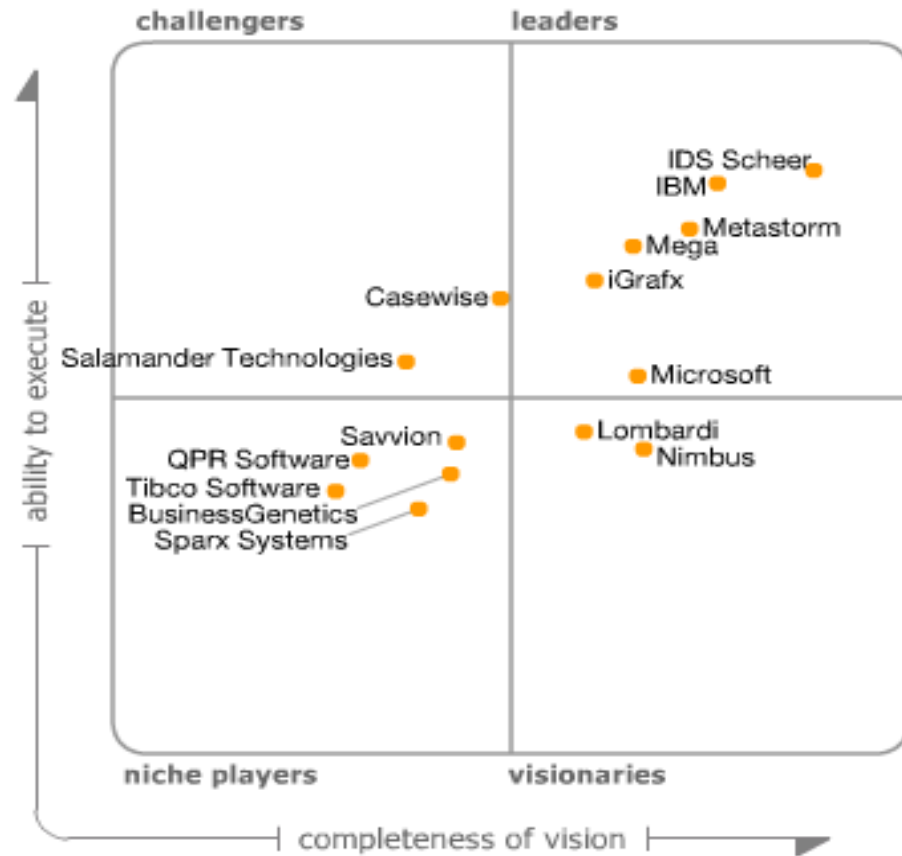


# QPR – Quality. Processes. Results



- ▄▄▄
 Founded 1991, QPR Software Plc is an international specialist providing software and solutions for
  - Process management
  - Performance management
  - Risk management & Compliance to Quality and Regulation
- ▄▄▄
 1500 customers, sales to over 50 countries, over 100 resellers
- ▄▄▄
 QPR Software is listed on NASDAQ OMX Helsinki Ltd. (ticker: QPR1V).

# Gartner BPA Magic Quadrant 2010



As of February 2010

# QPR history in brief





# In B-to-B Horizontal Product Business...

- ||| Know your competition
- ||| Invest in high profile reference customers
- ||| Invest in market analyst relations – Gartner, Forrester, Bloor etc.
- ||| Ask yourself every day: What is the potential of this product?
- ||| Decide your international expansion strategy – direct or channel business or both? Partner intimacy or Product Excellence?
- ||| Define your ideal customer
- ||| Leverage your specialist strengths against the giants
- ||| Dare to focus
- ||| Differentiate your market message
- ||| Don't do everything yourself – utilize ready platforms and components
- ||| Establish several close "lead user" relationships with customers – drive innovation further with customers
- ||| Don't believe that all your markets are alike – understand cultural and other differences. Don't forget the importance of language localisations.



**Quality. Processes. Results.**

# Beware the Lure of the Horizontal

- ▶ Tend to attract many players
  - competition is severe
- ▶ Products serve a large customer based
  - products are complex and feature rich
  - high R&D investment
- ▶ Common functionality is shared with many users
  - generic features may not be competitive to vertical offering
- ▶ Bundling is common
  - Strong products subsidize weak ones
- ▶ Competitors copy product functionality
  - Price erosion
  - Differentiation harder to maintain



# BC Platforms

**Kuinka iso pitää olla, jotta pärjää?**

Timo Kanninen  
CTO/CEO

# Genetic research data management with unique experience

- Database management systems for scientists looking for genetic variations correlating with disease states and other outcomes
- Born global
  - Finnish patient cohort
  - Swedish university
  - Scientific collaboration with MIT, Boston
  - Financial support from US pharma company
- Unique experience
  - Working closely with academic research teams in the area of human genetics since 1997
  - Illumina and Affymetrix software partner, IBM Advanced Business Partner



# Supplier for leading life science universities, pharma and biotech



## Supplier of the world's largest genetic studies



# The biotech market is growing fast

The fastest growing (large) companies by Forbes:

Rank	Company	Business	5 year growth
1	Illumina	Biotech equipment	250%
2	Google	Online search engine	222%
3	Salesforce.com	Sales mgmt software	117%
...			
12	Celgene	Biotech	47%
17	LifeCell	Biotech	40%
19	Genentech	Biotech	34%
23	AmGen	Biotech	31%

# Basic company info

- 2009 income more than 1 MEUR
- Growth rate 2009 was 35%
- 15 employees
- Main office located in Otaniemi, Espoo
  - EMEA sales office in Berlin, Germany
  - US and Canada virtual sales office in San Jose, US
- More than 80% of income comes from outside Finland
- Steady growth without VC investments

# Niche market

- Niche market requiring special skills and network
  - Both IT and bio skills required
- Service important part of the offering
- A market of continuous technological change
  - Demanding agile product development based on scientific advances
- A tough market
  - The academic market is very challenging

# Hallituksen tehtävä

Strategia  
Hyvä hallinto  
Johdon motivointi ja tuki  
Tasapuolinen omistajien etu



# Affecto

## The Major Player in Business Intelligence Solutions

Affecto's **Business Intelligence solutions** enable organisations to integrate their strategic targets into their business planning and management and decision-making process.

Affecto builds also **versatile customer specific operational IT solutions** to improve the efficiency of organisation's business and related processes.

Affecto is a leader in implementing **TIA systems (The Insurance Application)** for global insurance sector.

Affecto is headquartered in Finland and has also operations in other Nordic countries and in the Baltic countries. Affecto is listed in NASDAQ OMX Helsinki.

- >> Services
- >> Company
- >> Customers
- >> Product
- >> News and links
- >> Developers and integration



 LOGIN

## Survey and analysis software

### An easy tool to ensure **good decisions**

#### Manage information easily

**Webropol** is an online solution for conducting surveys, gathering data, managing feedback, and reporting data. **NEW:** Analyse open ended text with the Text Mining tool!

Last year **30 000** users in **2000** organisations conducted surveys and gathered information in **17** languages exceeding **5 million** responses.

#### Our clients include:



#### Suits all information needs

From **global** multinationals to local entrepreneurs, from the UK to Singapore, Webropol offers an online survey solution that fits all.

#### Areas of use include:

- Marketing and Sales
- Human Resources
- Project Management
- Research

A survey in 2008 shows that 92,3 per cent of all users would recommend Webropol.



"We have been using Webropol survey software for several years. Using Webropol has freed resources enormously for work in other areas. I hope we continue to use Webropol in the years to come."

-Liz Moore, CRM Officer  
Times Higher Education University of the Year 2008/9

#### See Webropol in action!

Use 30 seconds to experience the effect of receiving immediate feedback!

[Click here to answer two quick questions and receive a report.](#)

#### Videoclips on how to use Webropol Online Survey Software with Facebook

Tap in to 300 million respondents and potential clients, students or employees. To make it easy for you to increase your business presence on Facebook, we now have easy to follow videos on using the new Webropol Facebook application. Click on the links below to access the videos.

<http://www.youtube.com/watch?v=xedR6K18hYc>

<http://www.youtube.com/watch?v=m40OpVDhL8g>





## SSH Tectia Solution

### Managed Security Middleware

SSH Tectia is a unique managed security middleware solution from SSH Communications Security designed to cost-effectively deploy and centrally manage secure end-to-end communication within the corporate networks of financial institutions, governmental organizations, and large enterprises.

### SSH Tectia Products

SSH Tectia solution has a modular structure and it includes the following product components:

#### **SSH Tectia Connector**

SSH Tectia Connector is a transparent, corporate end-user desktop client software that provides dynamic tunneling of client/server connections without the need to re-configure the applications.

#### **SSH Tectia Client**

Formerly known as SSH Secure Shell for Workstations, SSH Tectia Client provides secure interactive file transfer, and terminal emulation for system administrators to manage servers running SSH Tectia Server or other appliances using the Secure Shell protocol.

#### **SSH Tectia Server**

Formerly known as SSH Secure Shell for Servers and SSH Secure Shell for Windows Servers, SSH Tectia Server is a server-side component for SSH Tectia Connector and SSH Tectia Client. With multi-platform support, SSH Tectia Server can be installed in a wide variety of operating systems thus facilitating the adaptability of SSH Tectia into a heterogeneous IT infrastructure.

#### **SSH Tectia Certifier**

SSH Tectia Certifier is a public-key infrastructure (PKI) product for issuing and managing digital certificates in an enterprise environment. Support for two-factor authentication enables the use of smart cards and hardware tokens for strong authentication for both client/server and clientless web-based connections. This module also consists of SSH Accession and SSH Token Master components.

#### **SSH Tectia Manager**

SSH Tectia Manager is a unique management and operations module for operating secure services in a corporate infrastructure. It is designed to scale and reduce the operating costs of large and dynamic deployments of SSH Tectia client/server solution.

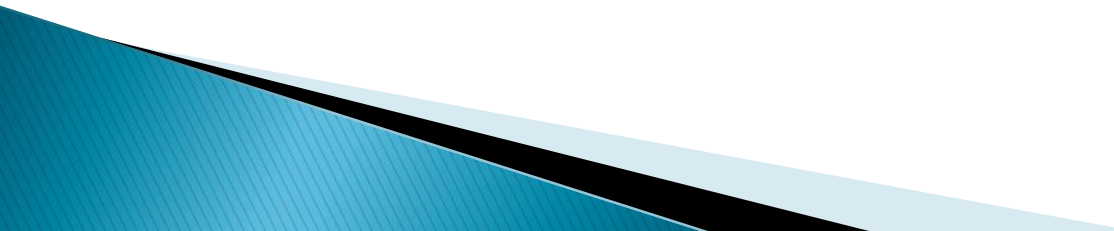
# Strategia

- ▶ Asiakastarve
  - ▶ Tarjooma
  - ▶ Asiakassegmentit
  - ▶ Kilpailuetu
  - ▶ Ansaintalogiikka
  - ▶ Liiketoimintamalli
  - ▶ Kanavastrategia
- 

# Hyvä hallinto

- ▶ Liiketoiminnan Prosessit
- ▶ Valvontajärjestelmät ja normit
- ▶ Eettiset toimintaperiaatteet  
(ihmiset, ympäristö, yhteiskunta)

# Johdon motivointi ja tuki

- ▶ Ylimmän johdon nimittäminen/erottaminen
  - ▶ Ylimmän johdon palkat ja kannustimet
  - ▶ Yhteiskuntasuhteet
  - ▶ Yrityksen julkinen kuva
  - ▶ Myyntituki
- 

# Tasapuolinen omistajien etu

- ▶ Tuloksen varmistaminen
  - ▶ Tasapuolinen voitonjako
  - ▶ Omistajaintressien tasapainottaminen
- 