Is there another graphic that would be better?

# HP Today

**Speaker's Name**
**Title**

# HP today

- Simplifying technology experiences around the world
- Fortune 9 – U.S.
  Fortune 32 – Global
- 321,000 employees
- 145,000 sales partners
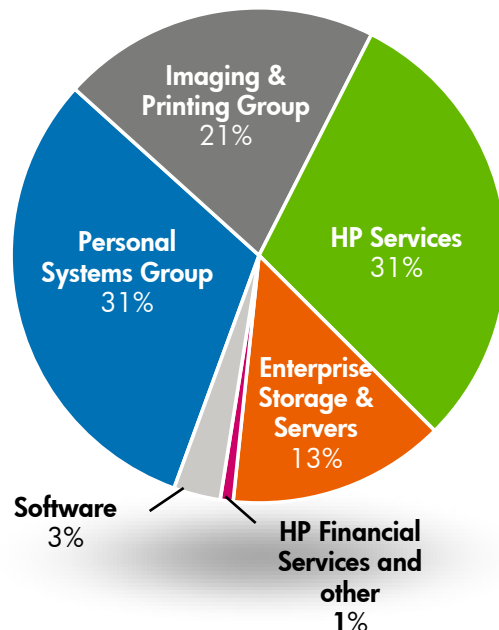- 210,000 service partners
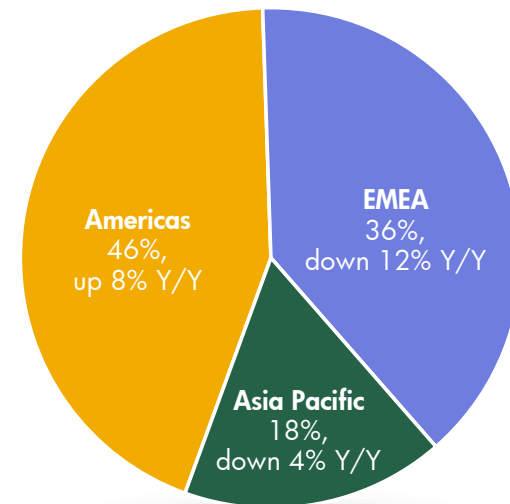- 88,000 retail locations

# The world's largest technology company

- Net revenue of $27.5B, down 2% Y/Y; up 4% in constant currency
- Third quarter non-GAAP diluted EPS of $0.91; up 8% Y/Y*
- Third quarter GAAP diluted EPS of $0.67, down 16% Y/Y
- Cash flow from operations of $3.9B

## Q3 FY09 revenue: $27.5B

### Revenue by segment

- Imaging & Printing Group 21%
- HP Services 31%
- Personal Systems Group 31%
- Enterprise Storage & Servers 13%
- Software 3%
- HP Financial Services and other 1%

### Revenue by region

- Americas 46%, up 8% Y/Y
- EMEA 36%, down 12% Y/Y
- Asia Pacific 18%, down 4% Y/Y

# Leadership across the board
## Worldwide market share data for Calendar Q1 2009*

| MARKET | SHARE | POSITION |
|---|---|---|
| Blade Servers | 52.2% | #1 |
| x86 based Servers | 36.5% | #1 |
| Unix + Linux + Windows Servers | 33.7% | #1 |
| Branded Tape Drives | 41.2% | #1 |
| External Disk Storage Systems | 18.6% | #1 |
| Open SAN Systems[5] | 17.1% | #1 |
| Automated Software Quality[1,6] | 44.8% | #1 |
| Distributed System Management Software[1,6] | 15.8% | #1 |
| IT Asset Management Software[1,6] | 21.4% | #1 |
| IT Services[1,4,7] | 6.5% | #2 |
| Outsourcing[1,7] | 9.6% | #2 |
| Support and Training[1,7] | 7.1% | #2 |
| Inkjet printers[8] | 44.0% | #1 |
| Laser printers[8] | 38.0% | #1 |
| Ethernet Switches | 4.9% | #2 |
| Workstations[3] | 39.4% | #2 |
| Notebooks[2] | 22.7% | #1 |
| Desktops | 17.8% | #1 |
| Thin Clients | 26.7% | #1 |

* Some data is as of other time periods based on data availability, see Notes for details.  In general data is based on IDC CY09 Worldwide Quarterly Tracker Data (Server, PC, Workstations, Hardcopy Peripherals, Disk Storage, Switches, Services) and IDC CY07/08 Software and Services Data

4

# HP executive team

**Chairman and CEO**
Mark Hurd

**Personal Systems Group**
Todd Bradley

**Administration**
Peter Bocian

**Information Technology**
Randy Mott

**Imaging & Printing Group**
Vyomesh Joshi

**General Counsel**
Mike Holston

**Human Resources**
Marcela Perez de Alonso

**Technology Solutions Group**
Ann Livermore

**Finance**
Cathie Lesjak

**Strategy & Technology**
Shane Robison

**HP Labs**
Prith Banerjee

**Sales**
Don Grantham

**Marketing**
Michael Mendenhall

# Research & development

**New ideas and new thinking**

- 30,000+ technical contributors

- Company-wide R&D strategy driven by Shane Robison and Office of Strategy and Technology

- Business groups enhance core products, services and customer experiences

- HP Labs innovates "beyond" the roadmaps

# Global citizenship at HP

| Corporate accountability and governance | Design for environment | Community investment and involvement |
|---|---|---|
|  |  |  |
| • Ethics<br>• Privacy<br>• Supply chain | • Products<br>• R&D<br>• Operations<br>• Supply chain | • Investment<br>• Volunteerism<br>• Public policy<br>• Stakeholder relations |

# Strategy

# HP's strategic plan

**HP strategic objective**
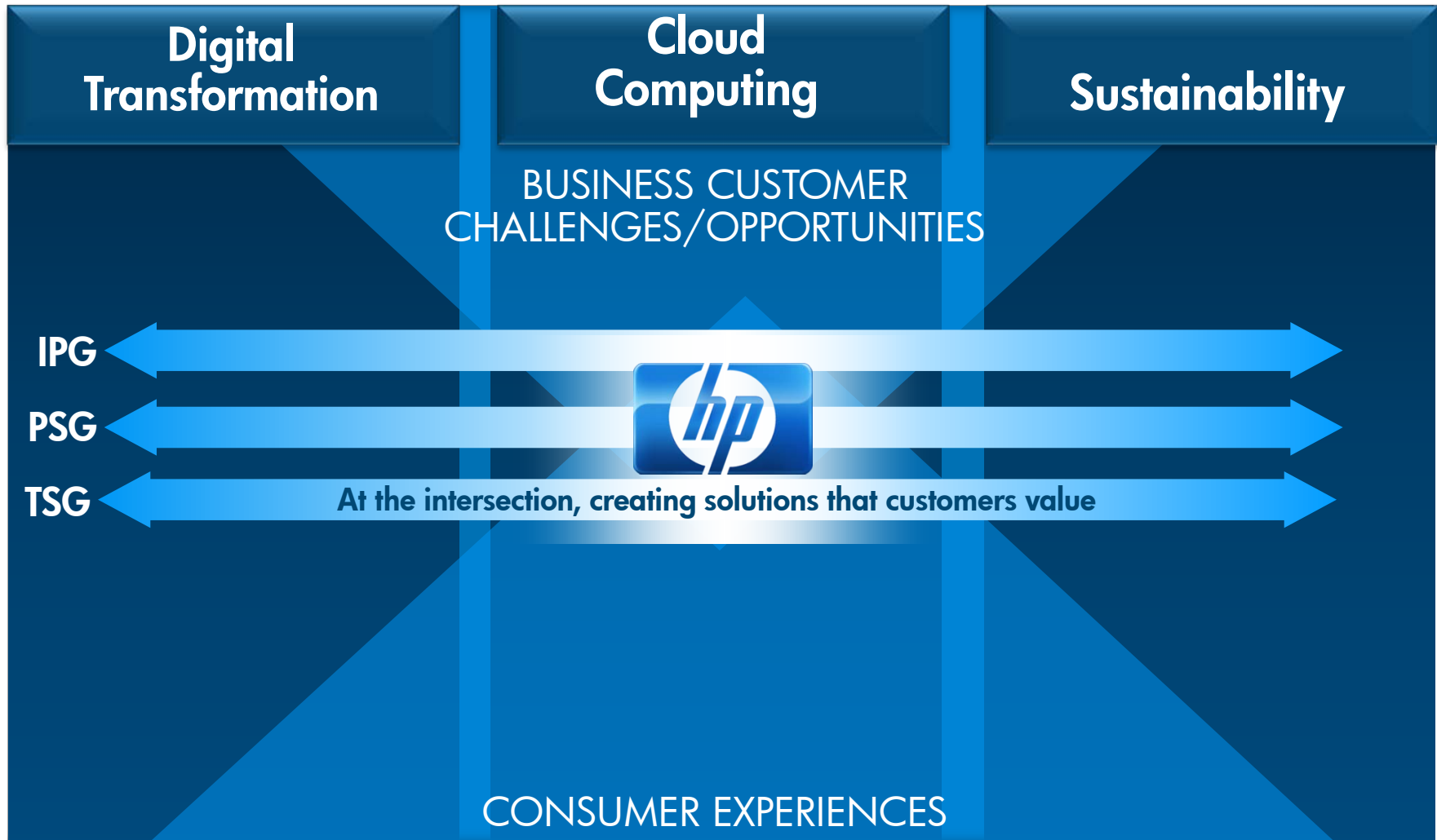Establish HP as the world's leading technology company

## HP strategic framework

1 Invent & develop technology solutions for our customers

2 Drive select industry trends

3 Become the best-in-class in the industry

## HP operating framework



Targeted growth

Efficiency

Capital strategy

hp
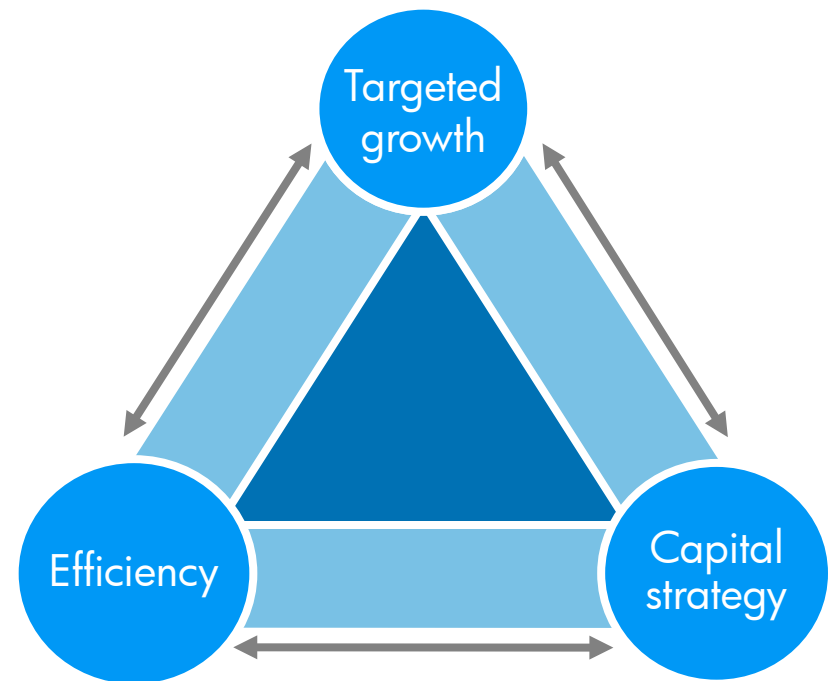
# Focused on three key global trends

## Creating solutions customers value

| Digital Transformation | Cloud Computing | Sustainability |
|---|---|---|

BUSINESS CUSTOMER CHALLENGES/OPPORTUNITIES

IPG

PSG

TSG

At the intersection, creating solutions that customers value

CONSUMER EXPERIENCES

# The industry's broadest portfolio

# HP's powerful portfolio

Imaging and Printing Group

# Imaging and Printing Group

**The world's leading imaging and printing supplier**

- More than 20 years of worldwide leadership in inkjet and laser printing

- Beyond products and services – creating new experiences for customers

- From printers to printing, investing in new areas

  – Digital photography ecosystem
  – Graphics and imaging
  – Video collaboration

  – Commercial printing
  – Information workflows
  – Environmental sustainability

# Imaging and Printing Group product portfolio


HP Officejet Pro L7590 All-in-One


HP Photosmart C8180 All-in-One


HP Scitex FB7500 Printer


HP Inkjet Web Press


HP Designjet 3200 Printer


HP Indigo 7000 digital press


HP Color LaserJet CM8060 Multi-Function Printer


HP HALO Telepresence Solutions

# Streamline information workflows to accelerate business

| Optimize infrastructure | Manage environment | Improve workflow |
|---|---|---|
| Standardize and optimize the imaging and printing network that is essential to your organization | Efficiently manage and ensure the secure, dependable operation of your enterprise network | Streamline document-intensive processes and leverage your network for business advantage |



**Reduce total costs**



**Increase efficiency**



**Accelerate business results**

# Personal
# Systems
# Group

# Personal Systems Group

**Designed for collaboration and productivity**

- Leading provider of personal systems, shipping over 50 million devices annually.

- Industry's broadest portfolio of notebooks, desktops, workstations, thin clients, displays, handheld devices, and personal storage solutions.

- Innovative product design for more personal experiences, secure collaboration and improved productivity.

# PSG product portfolio

**Consumer**



HP MediaSmart Home Server
for PCs and Macs



HP Pavilion dv2 notebook
with HP Advisor



HP Vivienne Tam Edition
Mini notebook



Compaq
desktop PC



HP Envy notebook
with Instant On Solution



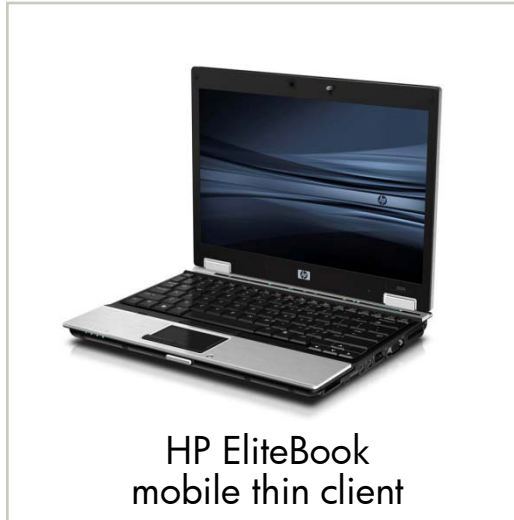HP TouchSmart PC
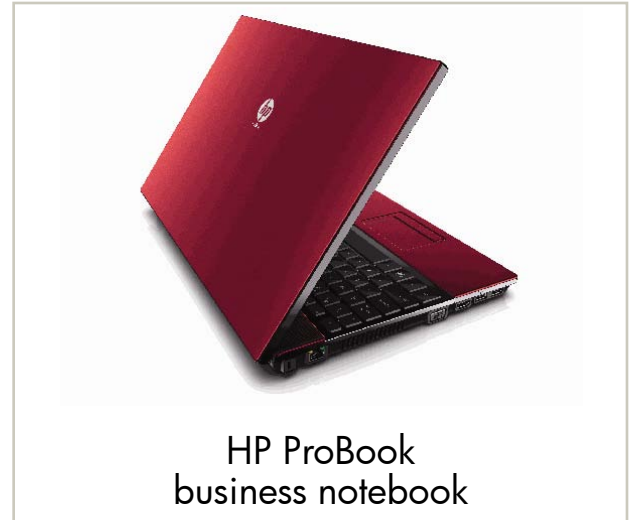with touch interface

# PSG product portfolio
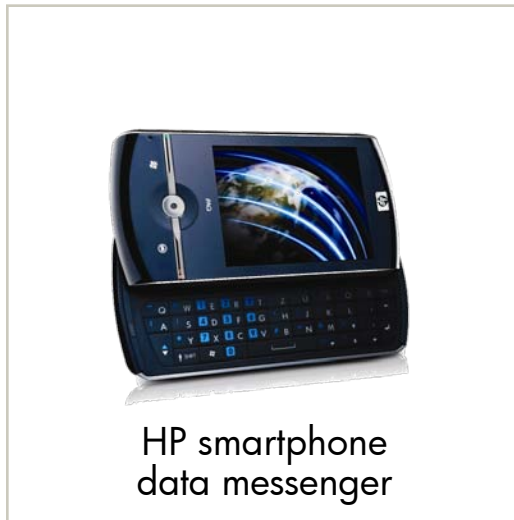**Commercial**


HP Z800
personal workstation


HP EliteBook
mobile thin client


HP ProBook
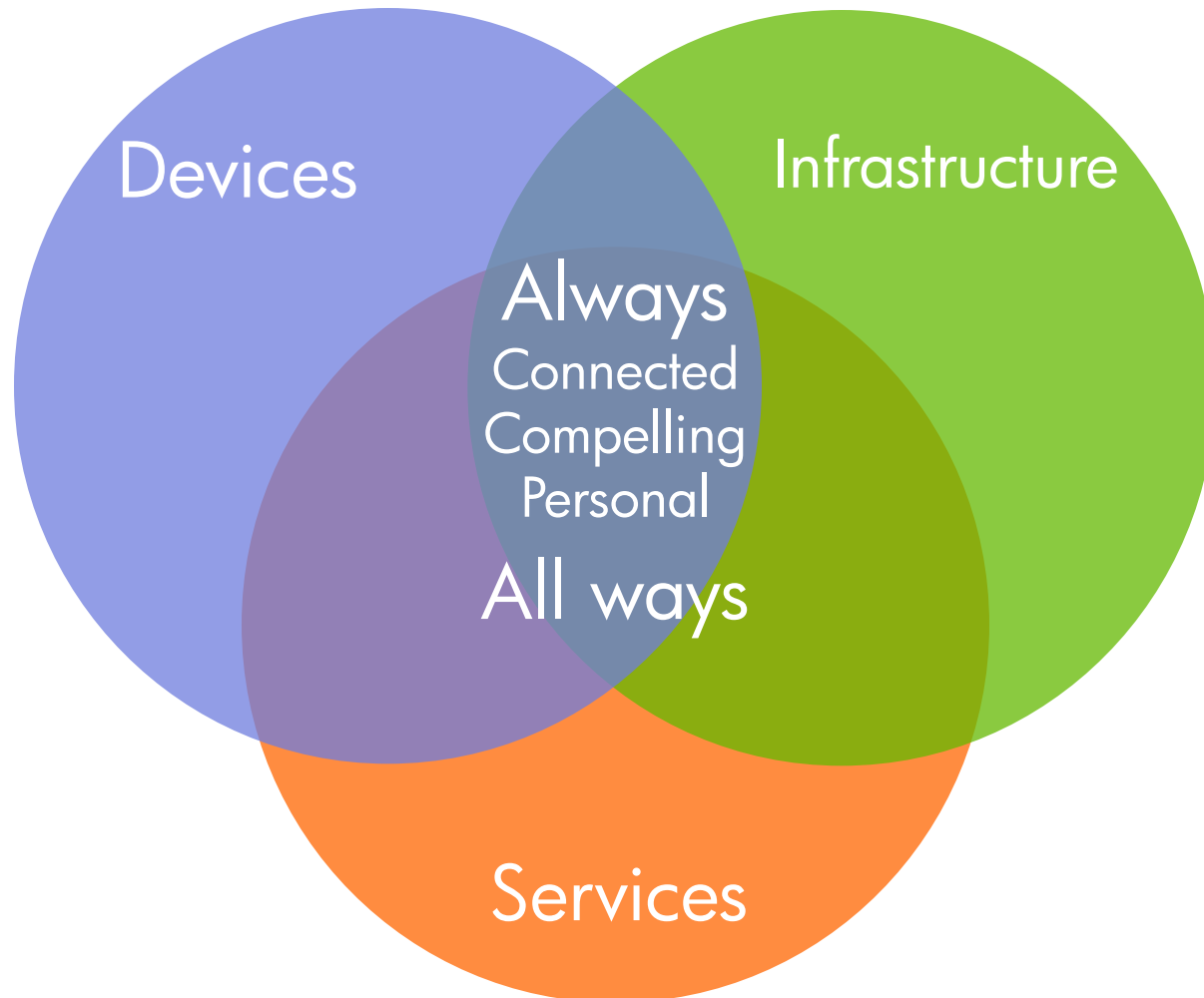business notebook


HP Power Manager software
for business PCs


HP smartphone
data messenger


HP Digital Signage
with touch interface

# Driving productivity at the intersection



Devices

Infrastructure

Always
Connected
Compelling
Personal

All ways

Services

# Technology Solutions Group

# Technology Solutions Group

**Technology for better business outcomes**

- Helping customers accelerate business growth, lower costs and manage risks

- Industry leading servers and storage, software and services

- Delivering solutions for:
  - Business Outcome Optimization
  - Business-ready Services
  - Adaptive Infrastructure

# Where IT results are measured in only one way: Business outcomes

## Accelerate business growth

- Speed time to market
- Drive new revenue streams
- Improve decision making
- Strengthen customer relationships

## Lower costs

- Enhance operational efficiency
- Reduce IT cost and drive down business cost
- Improve return on IT investments
- Improve workforce productivity

## Manage risks

- Improve compliance
- Protect critical assets
- Ensure continuity of business operations

* Customer priorities validated by HP CIO Agenda research

*hp*

# HP Business Technology portfolio

## Business Outcome Optimization

» Delivers the business value from the service
» Consists of Industry specific and Enterprise Shared Services

## Business-ready Services

» Proactive management of technology-enabled services
» Consists of Information and Data Services, Application Services, Service Portfolio Management

## Adaptive Infrastructure

» Delivers a truly business-ready infrastructure
» Consists of Management and Automation, Systems and Networking, Facilities and Services, Security and Compliance

# HP servers and storage

**Adaptive Infrastructure**
24x7 lights-out, virtualized, automated, space and energy efficient

| HP ProLiant | HP Integrity/ Integrity NonStop | HP BladeSystem | HP StorageWorks |
|---|---|---|---|
| • World's best selling servers<br>• 1-8 socket rack optimized servers<br>• Leading x86 infrastructure tools: deployment, migration, virtualization, consolidation, and energy efficiency | • Most trusted Business Critical Infrastructure (HP-UX, NonStop, OpenVMS, Windows & Linux)<br>• Industry's leading scale-up and virtual environments<br>• HP's Mainframe alternative | • Adaptive Infrastructure in a 17" and SMB box<br>• Optimize server, storage, interconnect and power and cooling infrastructure | • #1 in WW Storage Systems (disk & tape)<br>• Change-ready storage through virtualization and automation<br>• Cost-effective storage through data reduction and energy efficiency<br>• Broadest portfolio to store, protect, archive and manage data |

**HP Infrastructure Software and Data Center Infrastructure**
Physical and virtual management and control

# HP Services

Integrated solutions across infrastructure, applications, and business processes

## Adaptive Infrastructure

- Data center Transformation
- Mission Critical Services
- Networking Services
- Service Management
- Education Services
- Security, Compliance, and Continuity
- Workplace Services

## Business-ready Services

- Applications Development Services
- Applications Modernization Services
- Applications Management
- Enterprise Application Services
- Information Management

## Business Outcome Optimization

- Shared Services
- Customer Relationship Management
- Financial Process Management
- Administrative Services
- Industry Solutions

Consulting • Technology Services • Managed Services • Outsourcing • Cloud
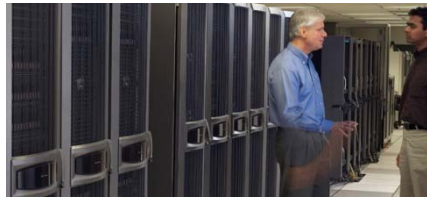
# HP software and solutions

**Optimize business outcomes and extract more value from your technology investments**



| IT management software | Information management software | Business intelligence solutions | Communications & media solutions |
|---|---|---|---|
| Optimize **business value of IT** | Optimize **business information** | Optimize **business performance** | Optimize **customer experience** |
| Ensure every dollar invested in IT, every resource allocated, and every application or service in development or production helps to deliver business objectives | Classify, preserve, discover, analyze, and recover information faster to proactively manage all business information across the enterprise and achieve legal and regulatory compliance | Provide timely insight and actionable intelligence to improve business performance, maximize worker productivity and capitalize on customer relationships | Deliver personalized, content-rich customer experiences over seamlessly managed networks to ensure loyalty, protect privacy, meet compliance mandates and drive new revenue |

**Services (Consulting, Education, SaaS and Support)**
Realize the value of HP software solutions more quickly, more fully, with less burden on your resources and more knowledge transfer to your staff

# HP ProCurve Networking



**The Adaptive Network**
Helping you adapt to the changing needs of your users, applications and organizations

| LAN switches | Wireless LAN | Security and Management | Data Center |
|---|---|---|---|
| • World's #2 LAN vendor<br>• Award-winning ProVision switches such as the Switch 5400 and 3500 Series<br>• Switches certified as Energy Efficient (Miercom)<br>• Industry-leading warranty, with HP service and support | • Intelligent 802.11n wireless solutions<br>• Wireless LAN controllers, access points, management and security tools<br>• Unified wired and wireless management lowers cost of ownership (IDC) | • ProActive Defense: Take control of your network to secure your business<br>• Network management simplified: ProCurve Manager Plus suite<br>• Solutions that are easy to deploy, manage and maintain – reducing need for large IT staff | • Data center switches and management software help you increase operational efficiency and manage costs<br>• Open-standards solutions with best-in-class Alliance partners such as F5 and Riverbed<br>• Automated provisioning technologies |

Delivering solutions for network Security, Unified Communications and Collaboration, Mobility, Network Systems and Management, and Data Centers

# HP Financial Services

# HP Financial Services

**Providing a full range of leasing and lifecycle asset management services**

- Making it easy and economical to deploy world-class technology solutions

- Financial solutions that help customers manage to the lowest total cost of ownership

- Industry-leading solutions that address risks associated with older or unneeded IT assets
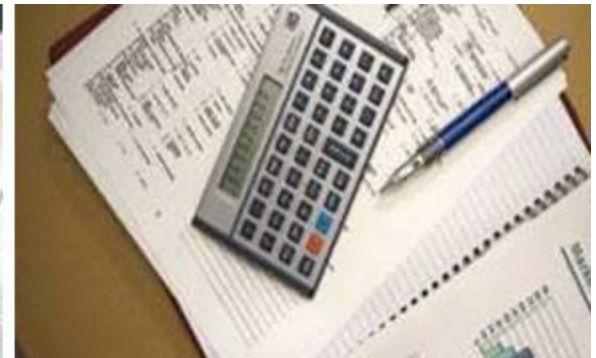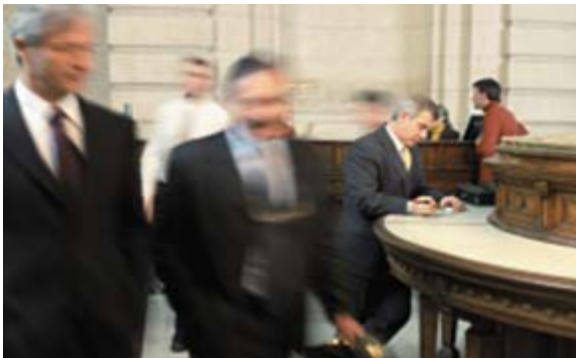
"HP employees are relentlessly focused on creating the best technology and services on the planet. We will do everything in our power to help our customers use technology to transform their businesses and make it easier to do what they want to do."

**Mark Hurd**
**Chairman and CEO, Hewlett-Packard**