For decades, the seat of technology purchasing power belonged to the CIO's office or internal IT department. And today, that body still holds significant sway in IT decision-making, budgeting and ongoing management. But times are changing, and for many channel firms a new potential buyer is emerging: the non-IT line of business executives.

CompTIA's study examines the habits of these new buyers, including those from marketing, finance, logistics and sales. Additionally, the study looks at IT job roles in these departments and the degree to which they are operating independently from a formal IT functional group within the organization.

KEY POINTS

Line of business buyers are flexing their muscles

Who ultimately decides what technologies or services are purchased has expanded beyond the IT department to individual business units, reflecting a shift from IT as a support function to IT as a strategic asset. Half of respondents said the prime objective for technology use today is more business focused than in the past. Another 45% said that ideas about technology come from different areas of their organization, and 36% said that more business executives are involved in the IT decision-making process.

Collaboration with internal IT still a major factor

Business units and IT staff still collaborate around tech choices, a dynamic that seems to suggest that the incidence of purely "rogue" IT behavior by LOB managers may have diminished. In fact, 4 in 10 LOB respondents said that their department works jointly with IT to determine which hardware, software, services and other tech solutions they will deploy. Just 19% said IT handles all such decisions; with even fewer (14%) saying that their individual business unit pulls all the strings.

LOB buyers are not so familiar with the channel

The vast majority of LOB buyers said they do not tap the resources of an outside firm to implement, integrate or manage their IT post-purchase. Instead, roughly a third each rely on their IT group, their own business unit expertise, or a joint effort between those groups to handle technology management. There is a positive caveat, however. For LOB's relying on their IT department to handle tech management, it's possible that said IT group is then turning to an outside channel firm to manage things. And while LOBs' lack of familiarity with the channel is troubling, viewed another way it's a new business opportunity to seize.

Business units staffing their own tech experts

Looking beyond their internal IT departments, LOBs are staffing their own departments with people in IT-oriented job roles. CFOs, CMOs and other LOBs in the study say they have dedicated technology roles within the walls of their departments, including everything from data scientists to business analysts to software developers. More than half have created hybrid positions where job roles are partly technical-, partly business-focused.

THE NEW FACE OF THE IT BUYER: FROM MARKETING EXECS TO FINANCE OFFICERS

Who's the arbiter of IT purchasing? That used to be a simple question; throughout most of corporate history, the vast majority of technology decisions have been handled by an internal IT department. This individual or group selected, purchased and managed the company's hardware, software and related services, serving in the background as a supporting function of the general business. Owners of the tech budget, IT departments have held great sway over specific technology purchase decisions, and as a result have been the historic go-to group for IT channel firms in search of customers.

And yet, times are changing in the era of cloud, mobile, data and as-a-service business models. The new IT buyer could be anyone, with any title. Consider the following: a recent Gartner survey showed that more than half of the respondents from functional areas other than IT are involved in technology purchase decisions, and the rate of involvement appears to be increasing. Meanwhile, IDC forecasts in a report that "worldwide corporate IT spending funded by non-IT business units will reach $609 billion in 2017, a rise of 5.9% over 2016." By 2020, IDC expects LoB IT spending to be nearly equal to that of the IT organization.

Just who are we talking about here? It runs the gamut – chief marketing officers, finance heads, and executives spanning human resources, logistics, and sales departments are all asserting leverage in IT decisions today. From a channel perspective, this growing dynamic necessitates a change in approach on a variety of levels. Selling and working with business-oriented constituencies is an altogether different animal than negotiating a product upgrade or managed services' SLA with a CIO or other IT-related end customer.

CompTIA's study reflects the voices of these new buyers. The data measure business units' approach to technology, buying trends and triggers, who owns budget, and finally, whether they collaborate with IT staff in tech decisions.

Top Strategic Goals for Organizations

1. Implementing systems to enhance efficiencies **[39%]**
2. Identifying new customer segments **[37%]**
3. Renewing/maintaining key customer accounts **[36%]**
4. Launching new products/services **[35%]**
5. Innovation **[33%]**
6. Hiring skilled workers **[29%]**

How the IT Purchase Process Has Changed in Last Two Years

49%	Ultimate objective for technology is now more business focused
45%	Ideas come from different areas at the organization
36%	More business executives are now involved in decision-making process
28%	There are different criteria being used for evaluating technology
27%	Final decision is now made by a different group or person than the IT department

In addition to examining these areas across the aggregate of the survey sample, the study data has been cut to view these tech trends through the lens of individual business unit job roles, including job titles in marketing, finance, logistics/operations and sales/customer service.

In terms of direct involvement in technology decisions, CEOs, presidents and owners of end-user organizations reported the greatest level of involvement. Approximately three quarters or more of those respondents said that they are "very involved" in setting or influencing tech-related strategies and budgets, purchasing technology or working with outside providers, and managing technology. This could be higher than the total population of CEOs, it should be noted, as the study screened respondents for at least "some involvement" in technology decisions. Also, many CEOs from smaller companies do not have an internal IT presence so they are tasked with managing IT themselves.

Broken down by business unit role, CFOs and finance directors reported the next highest level of involvement across those three categories. Roughly 6 in 10 qualified finance-oriented respondents said they are very involved in strategic and tactical aspects of their company's IT, not surprising given that many of these individuals are working heavily with accounting software and data analytics solutions, both in the cloud and on premises.

What is surprising is that just a third of marketing executives reported heavy involvement in setting and managing the technology strategy within their companies. It's unexpected because marketing seems to be the business unit most cited in media as driving non-IT line-of-business technology purchases. It could be that many of these individuals do not influence broader corporate or organizational tech strategy, but exert plenty of pull – and budget – departmentally. Many CMOs are sanctioning different cloud-based applications to be used by their teams exclusively.

THE DELICATE DANCE BETWEEN BUSINESS UNITS AND IT DEPARTMENTS

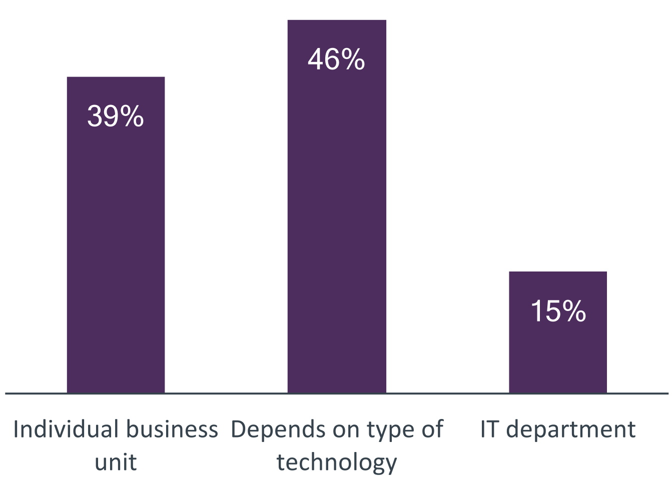
While business units in functional areas outside of the IT department are increasingly involved in technology purchase decisions, it is not to the exclusion of IT staff in most cases. More often than not, it appears that business units and IT staff collaborate around tech choices, a dynamic that seems to suggest that the incidence of purely "rogue" IT behavior by LOB managers may have diminished.

In fact, 4 in 10 LOB respondents said that their department works jointly with IT to determine which hardware, software, services and other tech solutions they will deploy. Just 19% said IT handles all such decisions; with even fewer (14%) saying that their individual business unit pulls all the strings. And then, another quarter of respondents demonstrate just how fluid things can be, reporting that their tech purchase process can present in a combination of ways: IT only, business unit only, or collaboration between both groups. FURTHER READING

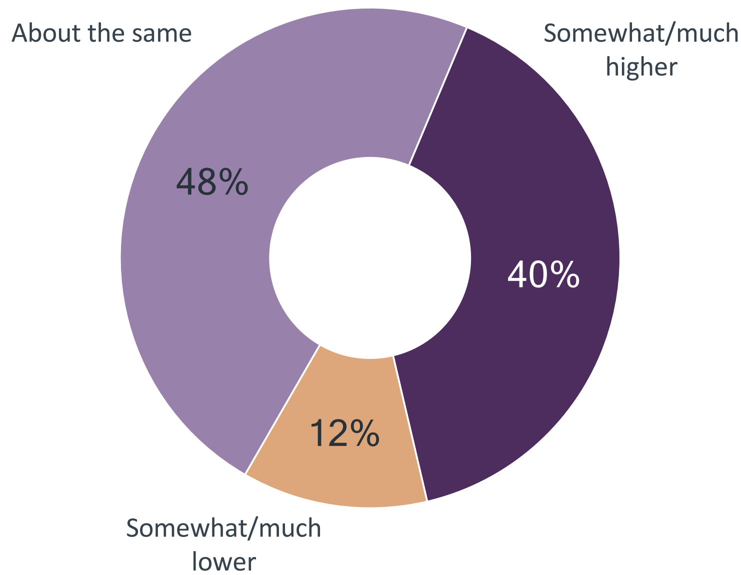
That said, all signs indicate that the role non-IT business units will play in both strategic and tactical decision-making for technology will only increase as businesses march toward the cloud and all things digital. That reality is going to trigger other organizational considerations. Chief among them? Who's is paying for what.

It stands to reason that the business unit itself would maintain a budget to handle IT-related purchases made independently of the IT department. But that is not always the case, especially in these early days of tech-buyer diversification. While nearly 4 in 10 respondents said their business unit foots its own IT bill, another 46% reported that the identity of the party that picks up the tab – business unit vs IT department – is dependent upon the type of technology that is being purchased.

Who Foots the Bill for Individual Business Unit Technology Purchases?



Size Expectations for 2017 Business Unit Technology Budget vs. 2016



Much of what is driving non-IT business units to dictate their own technology choices can be attributed to the ubiquity of cloud-based applications, which can be self-provisioned quickly within a department. These application-specific solutions are mushrooming across marketing departments and CFO offices. And it's most likely that these are the types of solutions that individual business units pay for out of their own budgets.

What's more likely to fall within the domain of the IT department's budget are infrastructure purchases such as desktops, servers, and other devices.

The trend of non-IT business units managing their own technology budgets shows no signs of abating. It's becoming more commonplace, in fact. Nearly 3 in 10 business units today have had their own tech budget for more than five years now, compared with just 7% that have had so for less than a year. Likewise, 4 in 10 respondents across all non-IT functional areas expect their individual business unit's IT budget to increase in 2017 over 2016 levels, compared with 14% that say 2017's budget will drop. FURTHER READING

And more spend is coming directly from those department budgets. More than half of respondents said that, of total spending on technology last year, between 15%-44% was paid for directly from the business unit and did not tap into IT coffers at all.

THE 'WHY' BEHIND THE NON-IT BUYER TREND

Myriad reasons account for changing norms related to IT decision-making and purchasing power. The aggressive push toward digitization and cloud computing, for one, has greatly emboldened business unit executives and staff to vet, choose and implement their own solutions. So has a tech-savvier workforce now populating all business units and job roles.

Indeed, a tech-astute workforce is the primary reason study respondents cite for their business units making at least some of their technology purchase decisions independent of the IT department. Exactly half said that their business unit employees' "tech-savvy" and "innovative" nature gave them confidence and insight to make department technology decisions.

As a result, many business unit employees are doing their own research into the latest technology solutions to address their specific initiatives and projects. And the resources for them to do so abound.

Consider just one example: a leading trade publication aimed at marketing specialists called MarketingLand.com. Its Web site alone sports dozens of buying guides and primers about the latest and greatest software applications that marketing gurus might be scouting. From social media platforms to analytics packages, the publication details how these solutions fit into an overall marketing strategy. "Enterprise Paid Media Campaign Management Platforms: A Marketer's Guide" is just one available title, for example. Given the specificity of this title, it's clear these guides are not aimed at the IT department of any organization, but directly to LOB buyers. Myriad publications of this ilk exist that are aimed at LOBs in finance, logistics, sales and other business units. And they are increasingly filled with technology-focused information. FURTHER READING

Like these industry publications, channel firms looking to appeal to LOB constituents need to speak the vernacular. Business is the primary language to speak, but exhibiting fluency in the unique dialects for marketing, sales, logistics, HR or finance ups your game even more. Channel firms also gain an edge when they understand why these business units are taking control of more tech purchasing than in the past.

Cloud is one main reason. Nearly 4 in 10 respondents said that cloud computing has made it simpler to self-provision technology, chiefly applications, without IT involvement. Now that reality may be daunting to a solution provider or MSP that feels edged out of a potential sale, but if played right it can actually open doors. Consulting, integration, security, management and compliance comprise a raft of services that many LOB buyers might not consider nor in some instances think they need when provisioning a SaaS solution on their own. Channel partners that are able to address this lack of awareness through education and consulting stand a good chance of winning business among the LOB buyers.

Another reason that non-IT LOB respondents are dictating their own IT purchase decisions today is because it's an organizational mandate. Twenty-two percent of respondents cited a leadership directive to decentralizing IT purchasing across business units. A decentralized approach to purchasing technology – or any other asset or service – carries some obvious advantages. One is speed. Purchasing can be done quickly and in the exact moment required without having to go through a central IT department where bottlenecks or delays may occur. For a marketing professional working on major customer campaign, the ability to provision a specific application in real time from a cloud vendor could be the difference between meeting a deadline or not.

There are downsides to decentralizing IT purchasing, of course. Security and compliance oversights can occur if the IT department is not looped in, while the benefits of bulk buying are often negated, to name a few. Respondents in the study appear to recognize the need for balance. More than half (53%) said the best way to handle IT buying is to do so collaboratively with their IT counterparts. That compares to 24% in favor of centralized tech buying by the IT department, and 12% that believe it is best if business units handle it themselves. Another 11% say a conditional approach is best, which basically means that the type of purchase being made – devices vs. applications, for example – dictates who owns the decision.

Opposite Ends of Spectrum: Reasons for Preferred IT Buying Approach

Centralization is optimal because…

64%	IT professional are the experts
49%	Need to focus on our core business unit mission
40%	Security and compliance

Decentralization is optimal because...

61%	Each business unit undertands its individual needs best
46%	Less bureaucratic / faster results
43%	More focus on innovation with business units

MANAGING IT ALL: IT'S A CHANNEL FIRM OPPORTUNITY

As today's non-IT LOB executives play a larger role in technology decision-making and buying, they in turn must think about the ways the technology they use will be managed over time. It's not a cut and dried decision. Does someone within the business unit handle this? Does the IT department take the reins, even in the case where it had nothing to do with selecting the technology? Or finally, does the individual business unit turn to a third-party solution provider, MSP or other kind of channel firm to shepherd technology once it has been purchased or provisioned in the cloud?

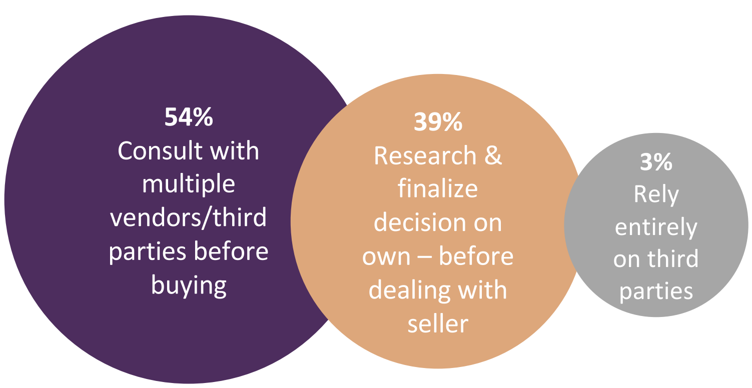
All are valid options, but as it turns out for the channel, LOB's use of third parties to manage their technology is sparing. The vast majority of respondents said their individual business unit did not tap the resources of an outside firm to implement, integrate or manage their IT in the past year. That compares with roughly a third each that instead relied either on their IT department, their own business unit expertise, or a collaborative effort between those two groups to handle the task. One noteful caveat? It's quite possible that those IT departments are in turn outsourcing some of that work – and LOB is unaware.

LOB's limited channel use is both good and bad news. First, the bad news: these IT buyers lack familiarity with outside providers, perhaps because they are simply new to the IT buying and management process, or they have had a negative prior experience. Internal IT staff naturally have a much keener understanding of the ecosystem of resellers, solution providers, MSPs and IT consultants that exist to serve them, and as such are more likely to consider hiring them. The good news? The unknown is an opportunity. Channel firms can acquaint themselves with non-IT buyers, educate them to benefits of using a third party, and in turn learn about their business. The result should build a new pipeline of business.

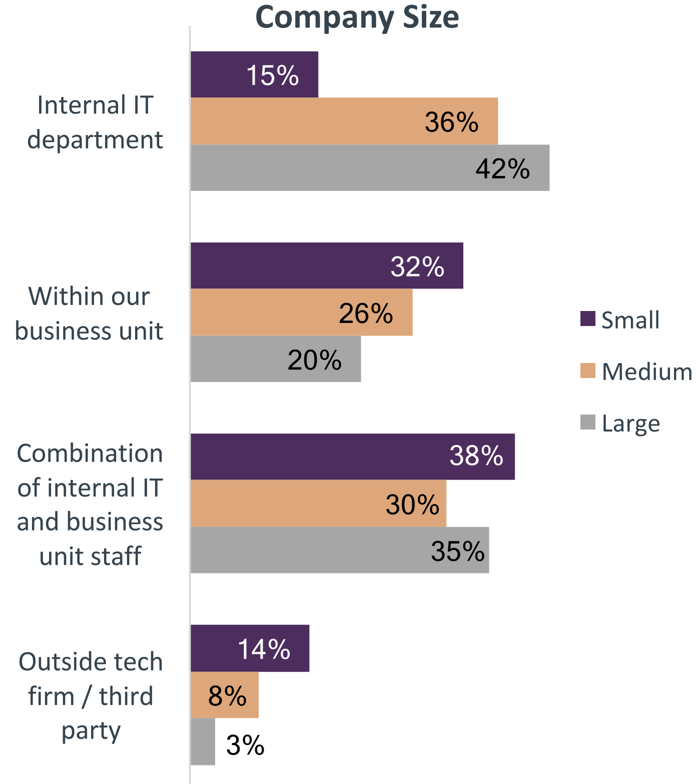
FURTHER READING

Business units in smaller companies used outside parties to manage their technology at more than quadruple the rate of

LOB Customers' IT Decision Process



Who Manages Tech Used in Individual Business Units by Company Size



business departments in the largest organizations polled in the study. Fourteen percent of small company business units used an outside provider compared with just 3% of LOB buyers within enterprise companies. In all likelihood this reflects the fact that SMB organizations often do not have their own IT department to handle such duties or, if they do, it is staffed by just one or two individuals. Outside help is often needed.

Within the various types of business units, executives in a finance role were most inclined to use a channel firm to help manage their IT. Fourteen percent of respondents in this category worked with an outside firm last year compared to just single percentage instances of LOB executives in marketing, sales and/or logistics business units.

More than half of all LOB buyers that contracted with an outside firm to manage their IT did so on a regular or frequent basis, with another third reporting usage occasionally. This suggests that once LOB executives gain experience working with an outside channel firm, they are mostly satisfied with the return on investment. The majority (56%) worked with technology consultants, while 51% used an MSP and 24% hired a firm to manage their cloud assets. There's plenty of green space here for channel firms to pursue. They should consider revamping marketing messaging to reflect the business needs of these constituents and then promoting technology primarily as a way to achieve desired business outcomes.

A CLOSER LOOK: FINANCE LOB BUYERS

To get a better sense of shifting IT-buying dynamics, it's instructive to explore the habits of specific business unit types. In this section, we will do a deep dive into finance/accounting departments and their executives. How they make tech decisions, who makes them, and what job roles inside their department fall into a "technical" category are among some of the findings.

First off, among the various LOB titles looked at in this study, finance executives are the most involved in technology decision-making and management. Roughly 6 in 10 CFOs and finance directors professed a high level of involvement in all aspects of IT decision-making and management within their business units. Many finance executives have been working with accounting software packages for years, becoming adept enough that a segment of them have gone beyond consumer-only status to recommending and reselling these solutions to others. This evolution from user to seller is happening across the professional services vertical today, creating what the industry describes as "non-traditional" channel partners.

In the finance office, many of the most strategic priorities are either directly IT-related or indirectly reliant upon technology to achieve. Items such as profitability analysis and risk management – among the top 3 CFO priorities – clearly would be aided by the use of data analytics solutions. Other items on the list – preventing cyberattacks and data loss, and ensuring regulatory compliance – require very specific applications of technology.

CFO's Strategic Priorities

Incidence of Technical Job Roles within Finance/Accounting Business Units

44%	Data analyst
40%	Systems administrator
24%	Database administrator
23%	Business systems analyst
23%	Security specialist
19%	Software developer
19%	Data scientist
15%	Cloud specialist

Where are CFOs getting the information they need to make sound IT decisions? Half are appealing directly to tech vendors, providers and consultants. Another half turn to their peers, and another half rely on mainstream business publications such as the Wall Street Journal. Far fewer (17%) rely on finance-industry-specific publications such as AccountingToday.com or AccountingWeb.com. All in all, channel firms should interpret it as good news that CFOs are looking for advice from tech providers such as themselves. FURTHER READING

As finance departments rely more on technology to meet strategic goals, they need to figure out the best approach to IT management. Increasingly, CFOs are looking beyond reliance on their internal IT departments and staffing their own departments with people in IT-oriented job roles. While the sample size for this segment of findings is on the smaller side, directionally the data show that CFOs today have dedicated technology roles within the walls of their department, which includes everything from data scientists to business analysts to software developers. Many have created hybrid positions where the job role is partly technical-, partly business-focused. Others are moving in the direction of staffing tech job positions, while some do not intend to do so – the latter group mostly likely relying on their IT department or an outside provider.

For those staffing tech jobs within their departments, close to a third have been doing so for five or more years, which underscores just how deeply IT has permeated all corners of a typical business. And the reasons for doing so are myriad. More than half (53%) of CFOs cited faster response time and project completion, as well as easier and more efficient collaboration as driving factors in staffing an IT-related person in their department rather than using the internal IT workforce. Another 31% said they did so to maintain tighter control of their own staff, while 27% said that cloud computing has changed how they view IT buying, provisioning and staffing.

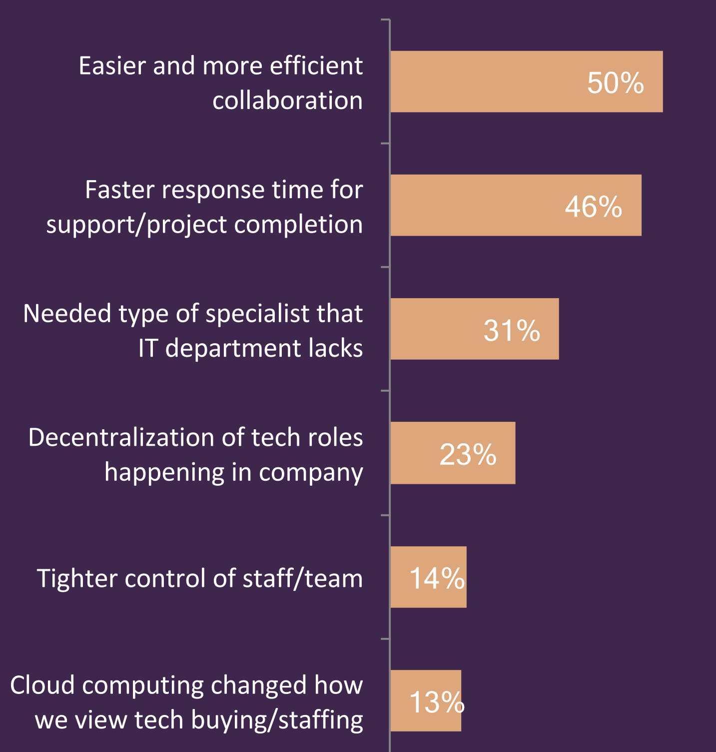
A CLOSER LOOK: MARKETING LOB BUYERS

Marketing departments represent another epicenter of technology decision-making and buying in today's shifting landscape. Armed with their own IT budgets, marketing teams are using technology of their choosing to fuel a number of key strategic priorities.

Consider the top four goals respondents cite for the coming year and the obvious connections to technology they each contain. Half of respondents prioritize becoming an "experience-led" business, which they define as delivering on technological transparency with a consistent voice and context to the customer. Another half want to embrace emerging technologies such as virtual and augmented reality, while 41% are looking to find the right balance between targeting customers and maintaining sensitivity to privacy considerations. Finally, 4 in 10 are striving for effective use o multi-channels, including mobile phones, automobile technology and smart TVs.

Yet interestingly, marketing as a tech force is still in the nascent stages, despite the fact that this group seems to be the business unit most cited in media outlets as driving non-IT line-of-business technology purchases today. CompTIA's study found that a third of marketing executives with at least some role in tech decisions reported "heavy involvement" in setting and managing the technology strategy within their organizations. It could be the case that

Reasons Given for Using Marketing-based Tech Staff vs Internal IT



Incidence of Technical Job Roles within Marketing Business Units

45%	Social media manager
39%	Digital marketing manager
32%	Systems administrator
31%	Data analyst
30%	Web analytics specialist
30%	Content manager/strategist
26%	Marketing technologist
26%	Database administrator

the other two-thirds of these individuals do not weigh in on broader corporate or organizational tech strategy, but exert plenty of influence – and budget – departmentally. Many CMOs are sanctioning different cloud-based applications and/or mobile devices to be used by their teams exclusively.

FURTHER READING

Additionally, a raft of other tech-specific activities fall under the domain of marketing departments today. And these are typically the types of projects that CMOs will pursue on their own and consider a tech expenditure that they fund out of their own IT budget. A few examples: 63% of respondents cited Web site development and management as a marketing department tech expenditure, 40% put creative/graphic design online in that bucket, and another 34% deemed the creation of a micro-site for a marketing campaign to be the tech responsibility of the business unit. Fifteen percent expressed the same sentiment about e-book and other digital creations work.

Marketing departments, like their counterparts in finance, also are hiring staff to fulfill these initiatives. These are job roles CMOs consider inherently technical in nature, such as social media strategist, Web analytics specialists, database administrator, SEO specialist, and systems administrators. These job roles correspond to the wide array of applications today's marketing departments are using.

Consider the applications palette in today's typical marketing department, representing both on premises and in the cloud deployments:

- Marketing/PR analytics (66%)
- Social media monitoring/management (59%)
- Graphic design (52%)
- Project management (50%)
- CRM (49%)
- Search engine optimization (42%)
- Content management system (46%)
- Marketing automation (27%)

RESEARCH METHODOLOGY

This quantitative study consisted of an online survey fielded to U.S. workforce professionals during February 2017. A total of 675 businesses based in the United States participated in the survey, yielding an overall margin of sampling error proxy at 95% confidence of +/- 3.8 percentage points. Sampling error is larger for subgroups of the data.

As with any survey, sampling error is only one source of possible error. While non-sampling error cannot be accurately calculated, precautionary steps were taken in all phases of the survey design, collection and processing of the data to minimize its influence.

CompTIA is responsible for all content and analysis. Any questions regarding the study should be directed to CompTIA Research and Market Intelligence staff at research@comptia.org.

CompTIA is a member of the market research industry's Insights Association and adheres to its internationally respected Code of Standards.

ABOUT CompTIA

The Computing Technology Industry Association (CompTIA) is a non-profit trade association serving as the voice of the information technology industry.

With approximately 2,000 member companies, 3,000 academic and training partners, 100,000 registered users and more than two million IT certifications issued, CompTIA is dedicated to advancing industry growth through educational programs, market research, networking events, professional certifications and public policy advocacy.

USEFUL RESOURCES

RESEARCH

CompTIA publishes 20+ studies per year, adding to an archive of more than 100 research reports, briefs, case studies, ecosystems, and more. Much of this content includes segmentations or analysis by company size and job role, and provides insights on various markets.

CompTIA Research Library

EDUCATION & CHANNEL TRAINING

CompTIA has an extensive catalog of Quick Start Sessions, Executive Certificate Programs, Playbook Workshops, and Vender & Distributor Education. Many aspects of the training focus on sales and solutions for the SMB market.

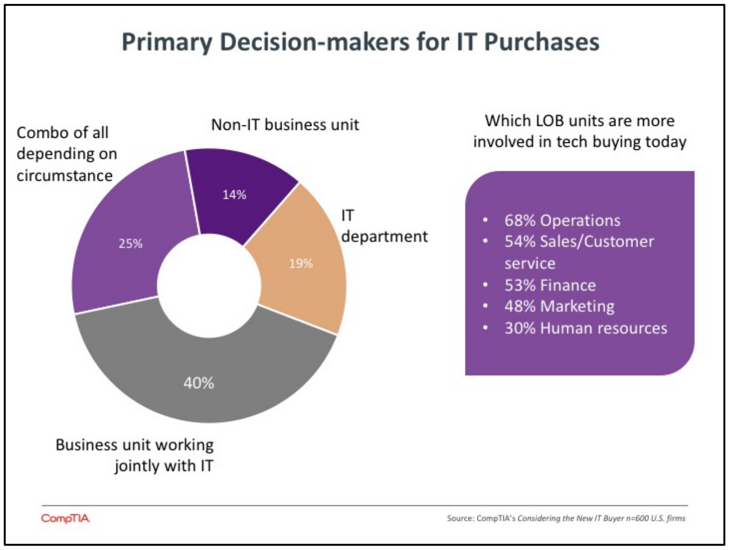
CompTIA Training Catalog

COMMUNITIES

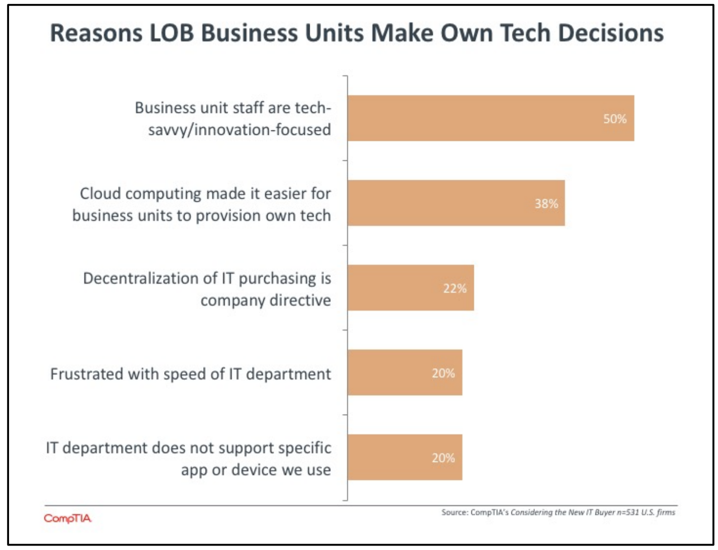
CompTIA member communities are forums for sharing best practices, collaborative problem solving, and mentoring. Discussions frequently revolve around the SMB market.

CompTIA Communities

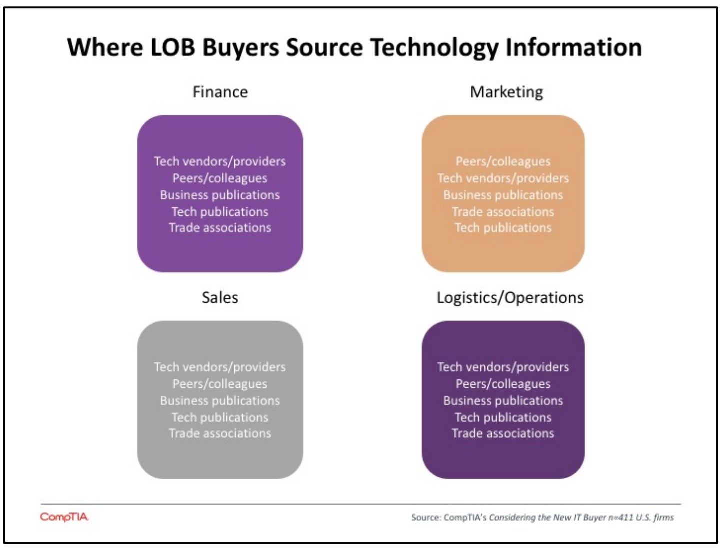
APPENDIX I



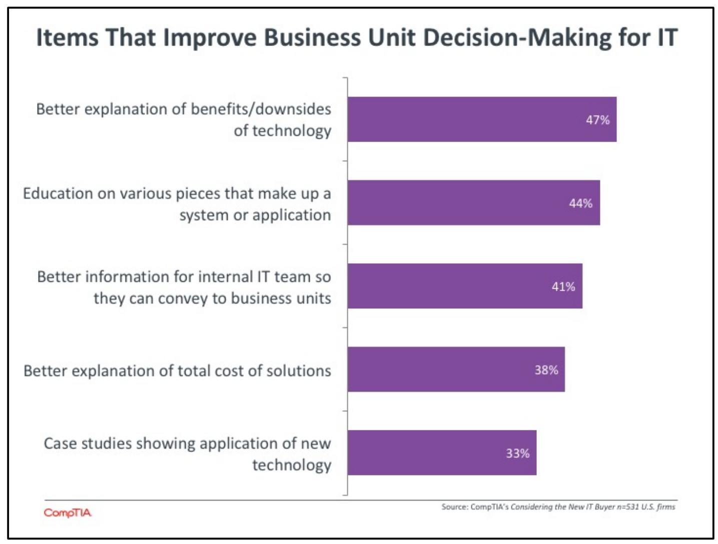
Primary Decision-makers for IT Purchases
Combo of all depending on circumstance
Non-IT business unit
IT department
Business unit working jointly with IT
14%
19%
25%
40%
Which LOB units are more involved in tech buying today
• 68% Operations
• 54% Sales/Customer service
• 53% Finance
• 48% Marketing
• 30% Human resources
CompTIA
Source: CompTIA's Considering the New IT Buyer n=600 U.S. firms



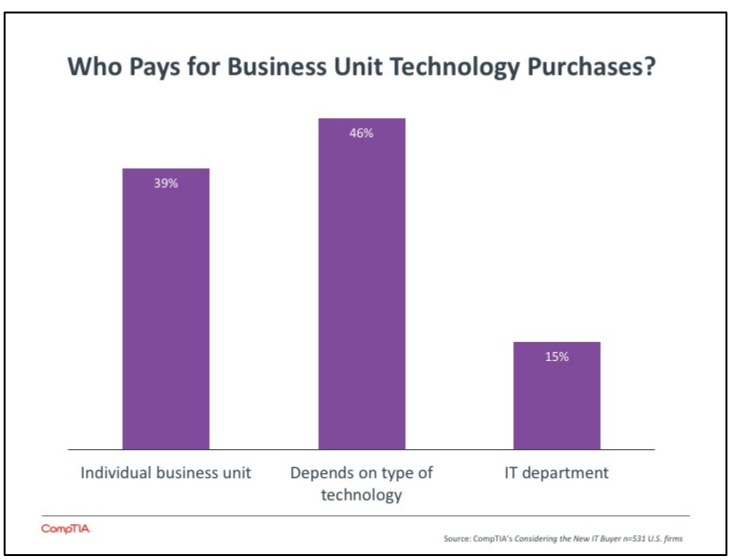
Reasons LOB Business Units Make Own Tech Decisions
Business unit staff are tech-savvy/innovation-focused
50%
Cloud computing made it easier for business units to provision own tech
38%
Decentralization of IT purchasing is company directive
22%
Frustrated with speed of IT department
20%
IT department does not support specific app or device we use
20%
CompTIA
Source: CompTIA's Considering the New IT Buyer n=531 U.S. firms



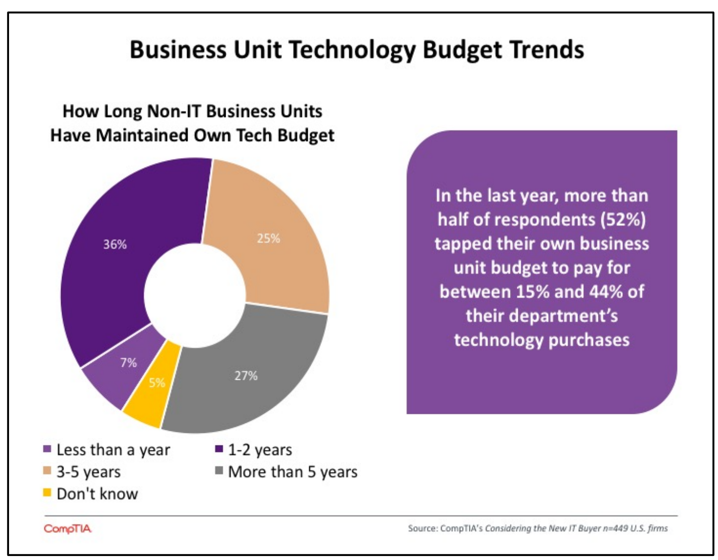
Where LOB Buyers Source Technology Information
Finance
Tech vendors/providers
Peers/colleagues
Business publications
Tech publications
Trade associations
Marketing
Peers/colleagues
Tech vendors/providers
Business publications
Trade associations
Tech publications
Sales
Tech vendors/providers
Peers/colleagues
Business publications
Tech publications
Trade associations
Logistics/Operations
Tech vendors/providers
Peers/colleagues
Business publications
Tech publications
Trade associations
CompTIA
Source: CompTIA's Considering the New IT Buyer n=411 U.S. firms



Items That Improve Business Unit Decision-Making for IT
Better explanation of benefits/downsides of technology
47%
Education on various pieces that make up a system or application
44%
Better information for internal IT team so they can convey to business units
41%
Better explanation of total cost of solutions
38%
Case studies showing application of new technology
33%
CompTIA
Source: CompTIA's Considering the New IT Buyer n=531 U.S. firms

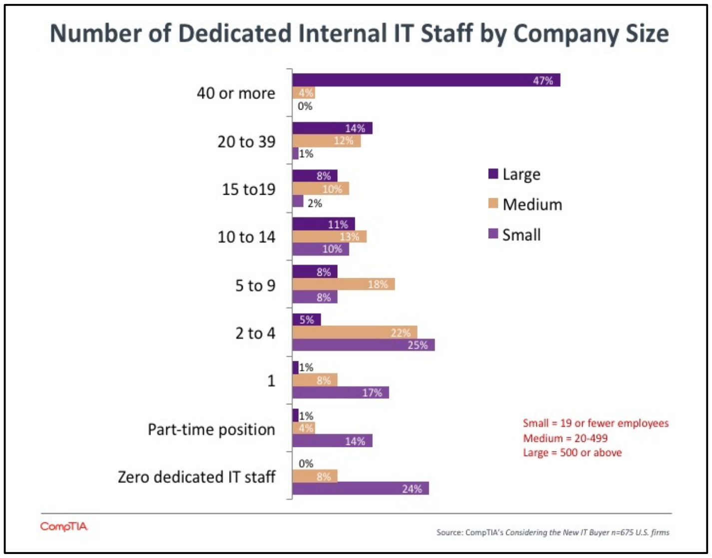


Who Pays for Business Unit Technology Purchases?
39%
46%
15%
Individual business unit
Depends on type of technology
IT department
CompTIA
Source: CompTIA's Considering the New IT Buyer n=531 U.S. firms

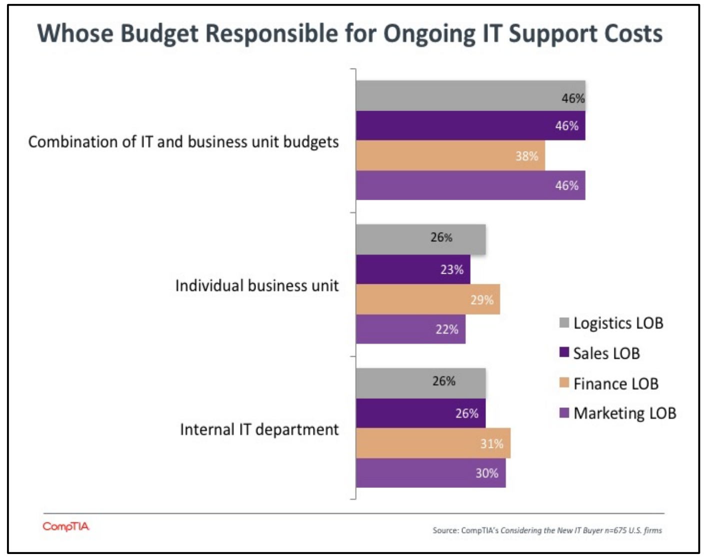


Business Unit Technology Budget Trends
How Long Non-IT Business Units Have Maintained Own Tech Budget
36%
25%
7%
5%
27%
Less than a year
1-2 years
3-5 years
More than 5 years
Don't know
In the last year, more than half of respondents (52%) tapped their own business unit budget to pay for between 15% and 44% of their department's technology purchases
CompTIA
Source: CompTIA's Considering the New IT Buyer n=449 U.S. firms

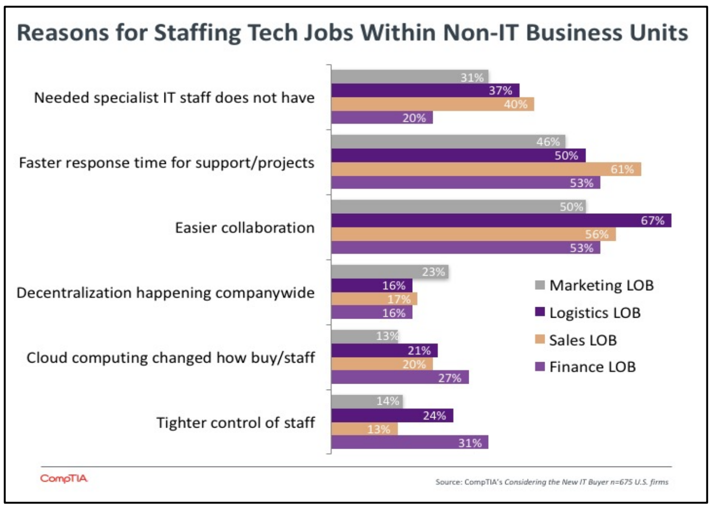
APPENDIX II



Number of Dedicated Internal IT Staff by Company Size
40 or more
47%
4%
0%
20 to 39
14%
12%
1%
15 to19
8%
10%
2%
10 to 14
11%
13%
10%
5 to 9
8%
18%
8%
2 to 4
5%
22%
25%
1
1%
8%
17%
Part-time position
1%
4%
14%
Zero dedicated IT staff
0%
8%
24%
Large
Medium
Small
Small = 19 or fewer employees
Medium = 20-499
Large = 500 or above
CompTIA
Source: CompTIA's Considering the New IT Buyer n=675 U.S. firms



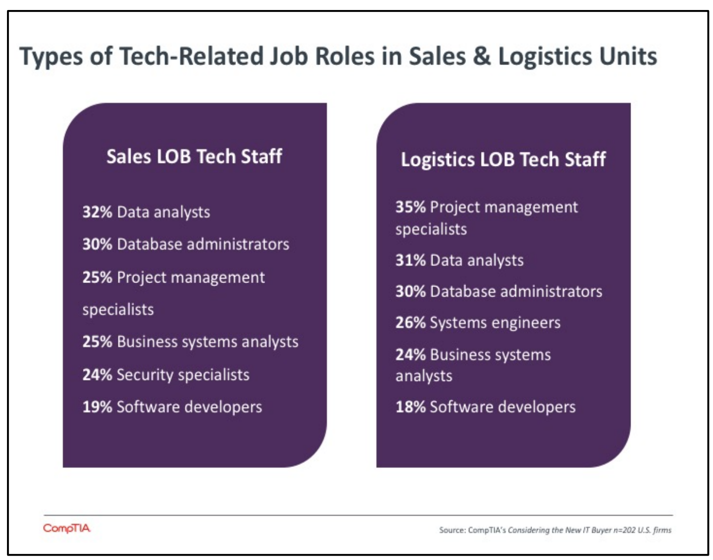
Whose Budget Responsible for Ongoing IT Support Costs
Combination of IT and business unit budgets
46%
46%
38%
46%
Individual business unit
26%
23%
29%
22%
Internal IT department
26%
26%
31%
30%
Logistics LOB
Sales LOB
Finance LOB
Marketing LOB
CompTIA
Source: CompTIA's Considering the New IT Buyer n=675 U.S. firms



Reasons for Staffing Tech Jobs Within Non-IT Business Units
Needed specialist IT staff does not have
31%
37%
40%
20%
Faster response time for support/projects
46%
50%
61%
53%
Easier collaboration
50%
67%
56%
53%
Decentralization happening companywide
23%
16%
17%
16%
Cloud computing changed how buy/staff
13%
21%
20%
27%
Tighter control of staff
14%
24%
13%
31%
Marketing LOB
Logistics LOB
Sales LOB
Finance LOB
CompTIA
Source: CompTIA's Considering the New IT Buyer n=675 U.S. firms

Strategic Priorities for Sales Executives
Better identification of sales targets
47%
Investigating client issue to define strategic impact of our solutions
39%
Gaining higher prices/profit margins
39%
Improved prospect qualification
36%
Dealing with low-cost competition
25%
Improving negotation skils
23%
CompTIA
Source: CompTIA's Considering the New IT Buyer n=102 U.S. firms

Strategic Priorities for Operations/Logistics Executives
Increasing efficiency across all channels/routes to market
59%
Improving customer service
45%
Automate processes
44%
Build a cloud computing strategy for operations/logistics
36%
Inventory management
31%
Practice inbound or demand-driven logistics
22%
CompTIA
Source: CompTIA's Considering the New IT Buyer n=100 U.S. firms



Types of Tech-Related Job Roles in Sales & Logistics Units
Sales LOB Tech Staff
32% Data analysts
30% Database administrators
25% Project management specialists
25% Business systems analysts
24% Security specialists
19% Software developers
Logistics LOB Tech Staff
35% Project management specialists
31% Data analysts
30% Database administrators
26% Systems engineers
24% Business systems analysts
18% Software developers
CompTIA
Source: CompTIA's Considering the New IT Buyer n=202 U.S. firms