Compass Playbook
for Partners

cobalt **IRON**®

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What is Compass?

Compass is a SaaS platform that plugs in and embeds various backup, storage, cloud, and other technologies to deliver enterprise backup in a software-as-a-service model. The Compass architecture is a new technical approach to data protection harnessing analytics and automation to drive down cost and complexity while delivering reliable, secure, immutable data and ransomware protection as well as valuable data insights to the business. Being plugged into the Compass platform, backup and storage technologies are completely managed, configured, maintained, monitored, and continually optimized with best practices allowing the power of these technologies to be experienced without the complexities.

The Compass Solution from Cobalt Iron

Proposition For Partners

Why is Compass such a compelling proposition for you?

- Cobalt Iron is 100% channel-focused and partner-first. We only sell through the channel so you can be sure you're working with a trusted channel-focused vendor.
- We focus on the things that are important to your customers: 1) saving money, 2) saving time, 3) simplifying their lives, and 4) improving the security of their data.
- We also focus on the things that make you successful: 1) differentiated solutions, 2) stellar sales support, 3) fast response times on quotes, 4) outstanding customer satisfaction, and 5) the most lucrative partner program in the industry.
- We provide you with a solution that competes with and dominates against EMC, Commvault, and all the other legacy and new vendors.
- We provide you with a solution to build a CSP and MSP offering around and brand as your own. One that is easy to deploy and manage while providing your customers with a simple to consume service and recurring revenue model.

We are Built for Partners

Our aim is to help our partners build more profitable data protection business. We do that by providing a solution that helps you:

- Improve customer satisfaction and strengthen position in the account
- Prevent existing Spectrum Protect or Cloud Managed Backup customers from going to a competitor
- Up-sell existing Spectrum Protect customers to a new service
- Sell to new customers with a compelling solution that meets a broad range of customer pain points
- Sell and get credit for multiple IBM products (if appropriate)
- Align your sales efforts with IBM management directives and messaging
- Sell value-added services with a new offering
- Sell a multi-cloud solution

What is the Cobalt Iron Commitment?

We know that you work hard to maintain great relationships with your customers and we truly value that bond. That is why the Cobalt Iron Sales Desk is committed to providing you with a higher degree of responsiveness than any other partner. Our team is ready to engage with you for account planning, customer presentations, technical pre-sales, and other activities to help you win. In addition, we take great pride in delivering the best sales collateral, sales training, and sales support in the industry. Our commitment to this level of support provides you with the basis to build a successful go-to-market strategy that delivers real profits.

The Data Protection Market

How is the customer's environment changing?

What we find with most customers is that their IT environments are becoming increasingly complex:

- Hybrid cloud environments are becoming the norm
- New applications driven by big data require performance and flexibility for data protection
- "Data protection by committee" with most customers having 3, 4, or 5 backup products in their environment and those products are becoming more complex and difficult to manage
- Organizations are losing the SMEs (Subject Matter Experts) for data protection
- Test/Development applications in the cloud are transitioning to production with no option to deliver data protection with legacy backup products
- Cyber attacks are increasingly targeting backup data and infrastructure

> **"90%** of organizations could not withstand more than an hour's worth of lost mission-critical data before experiencing significant business impact. **"**
>
> *Real-World SLAs and Availability Requirements*
> Enterprise Strategy Group, July 2020

> **"***Global cybercrime costs are predicted to grow by 15 percent per year over the next five years, reaching* **$10.5 trillion** *USD annually by 2025 … (this) will be more profitable than the global trade of all major illegal drugs combined.* **"**
>
> *2021 Report: Cyberwarfare in the C-Suite*
> CyberSecurity Ventures, January 21, 2021

Key Market Takeaways

Companies are looking to modernize their approach to backup

Cloud based solutions are in demand, if not compulsory

Ease of use is a key requirement

Scalable VM backup is a requirement

Robust security against cyberattack is a requirement for backup solutions

The Data Protection Market

Market Overview

47% of IT decision makers identified strengthening cybersecurity as the top business initiative driving IT spending in 2021.

75% of organizations' IT environments are more complex than they were two years ago.

*2021 Technology Spending Intentions Survey
Enterprise Strategy Group, December 2020*

For years now, many organizations have continued to re-architect their backups in an effort to modernize their approach to handle new data types and deployment models, increased workload volumes, and to improve backup and restore times to meet rising SLAs. Disk-based approaches (including backup directly to disk and additionally to a cloud target, array-based snapshot and replication exploitation, server virtualization backup features, and leveraging compression, deduplication and other data management efficiency technologies) are among the key items sought. Today, even backup to a flash target device is not out of the question.

Ease of deployment, with a rapid time to value, and especially a greater ease of daily administration are key requirements. Mission-critical workloads are predominantly deployed in virtualized environments, making capable, scalable VM backup a mainstream requirement.

Global Data Protection and Recovery Solutions Market Size, Status, and Forecast 2025

Calibre Research, 2018

Data Protection and Recovery Solutions Market
is expected to reach **$10.4 billion** USD by the end of 2025

Market CAGR of **5.4%** between 2018 and 2022

Cloud workloads represent **15.5%** of the market

Cloud market CAGR of **11.3%** from 2017 to 2025

On-premises workloads represent **84.5%** of market

On-premises market CAGR of **4%** from 2017 to 2025

# Challenges Around Modernizing Data Protection

Data Protection Challenges

- Complexity of managing many different backup products
  - Silos of data protection
  - Managing many vendors
- Maintaining Subject Matter Expertise for multiple complex backup products
- Lack of consistency throughout data protection landscape
  - High failure rates
  - Failure to meet SLAs
  - Inconsistent, or no, policy management
- Inability to incorporate cloud data protection easily into existing backup product
- Complexity creates massive administrative burdens on IT department
  - Software and hardware updates and patches may be inconsistent or not applied
  - Paying for features that are not installed
  - Systems may be vulnerable to security threats
- Multiple reporting tools, scripts, and formats must be consolidated to provide visibility to state of enterprise data protection
- Reporting tools lack analytic insights
- Accelerating data growth rates require enormous up front investments in hardware and storage for new or renewal backup products
- Purpose Built Backup Appliances are too costly, create vendor lock-in, and create more siloes of management
- Complexity can lead to system failures during disaster recovery, loss of data, and dramatically higher administrative overhead costs
- Cyber security is often an expensive point product providing only niche security protection

Compass Eliminates Challenges

- **Cyber Security** Compass delivers award-winning cyber readiness, response, and recovery for enterprise data protection at no additional cost.
- **Efficiency** Compass provides a dramatically more efficient OpEx "pay as you grow" model that eliminates costly over provisioning, typically saving customers 50% versus appliance based products such as EMC Data Domain/Avamar
- **Performance** Compass leverages automation and analytics to deliver better data protection, with industry leading success rates, and more consistent outcomes to meet all SLA objectives
- **Simplicity** Compass reduces the need for highly skilled backup SMEs with simple point and click functionality (no PHD in backup required)
- **Single pane of glass** Provides a cloud-based dashboard that allows management for the entire data protection landscape while providing complete reporting and audit trail capabilities
- **Cost** Typical savings of 50% using software-defined features vs using purpose built appliances
- **Future-proof design** Compass built-in-the-cloud technology is designed to constantly adapt to new infrastructure models supporting private, public, and hybrid cloud models
- **Software currency** Compass always maintains the latest versions of software (Compass, Spectrum Protect, OS, BIOS, security patches, etc.) to make sure that you are getting all of your software value and protections
- **Administration** Eliminate 80% of administrative overhead
- **Production ready** Accelerators are delivered production ready then they are automatically maintained and updated. This simplifies operation while ensuring consistency of features and performance across the enterprise.
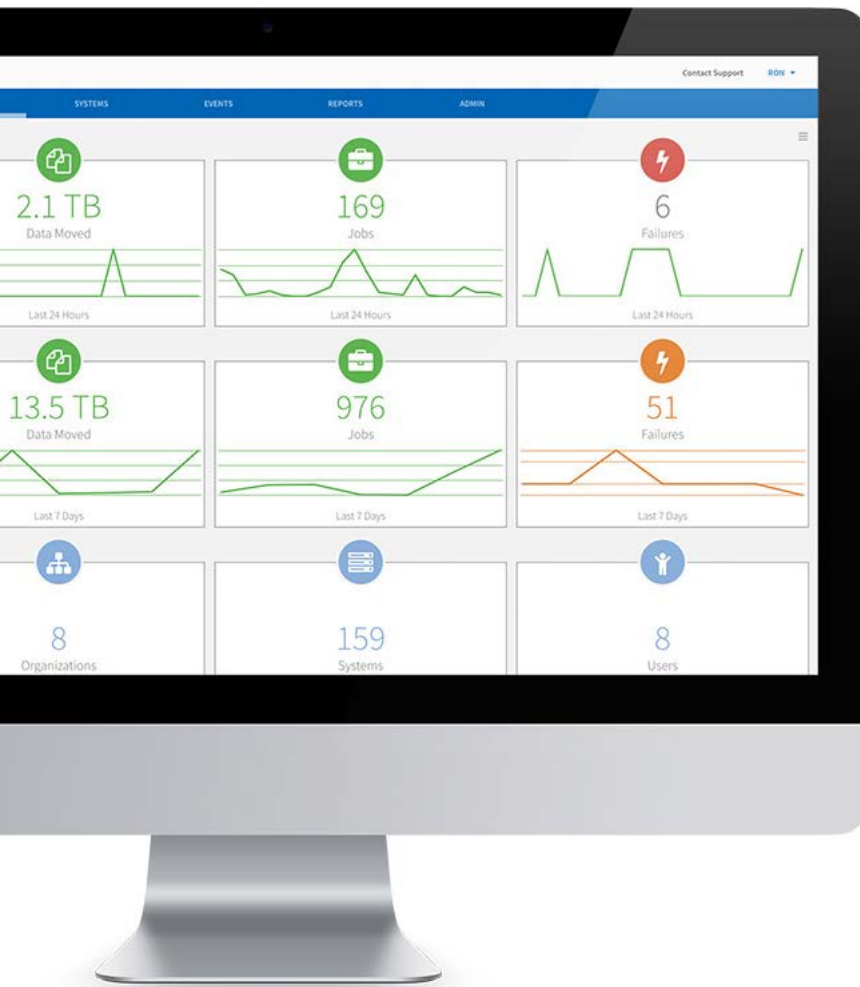
Benefits of Compass

Delivering Modern Data Protection Customers Want

What we find with most customers is that their IT environments are becoming increasingly complex:

- Automated daily operations
- Stability and predictability with security at the core
- Pay per capacity
- Uniform across all platforms and locations
- Easy access throughout the world
- Alerts to potential problems

More Intelligent Data Protection

- Global policy management
- Proactive problem avoidance
- Automated software and hardware updates
- Role-based access control
- Multi-tenancy
- Charge back / show back
- Multi-cloud support
- System exceptions and issues notification

- Ticket management for all issues and events
- Customer-assisted events
- Compass managed and resolved events
- Configurable alerts
- Notifications to systems/application owners
- Deferred notifications to match policy requirements
- Orchestration and integration with enterprise systems

Compass Platform Components

Compass uses analytics, automation, and a cloud-based architecture to modernize data protection.
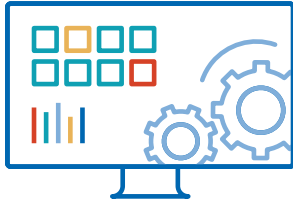
Commander is the web interface providing a simple, centralized workspace for all consumer services. Everything from control to visibility is provided without the need for complex training or technology skills.
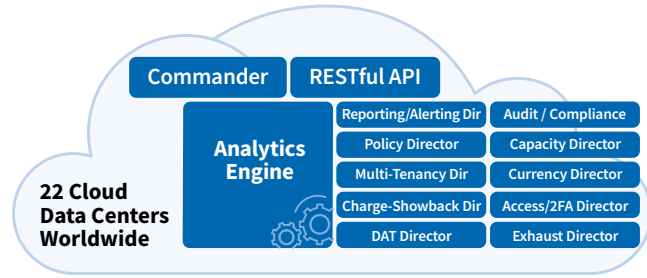
The **Analytics Engine** puts technology to work and provides increased simplicity, efficiency, and value. Compass delivers operational intelligence driven by extensive data collection. Using this metadata, Compass provides hands-free operations, proactive problem avoidance, and automated efficiencies.

Accelerators are delivered ready to plug in and start taking on workloads. No more hardware configuration, storage monitoring, service and support ticketing, backup software revision management, or security software patch updates. Accelerators are constantly maintained and updated, ensuring that data protection is ready to support new technology investments. This is done automatically, without intervention by the customer. Accelerators come in physical, virtual, and cloud versions.

The Compass platform offers two classes of storage

Accelerator Managed Storage (AMS) is fully managed and updated by Compass. Customers receive the highest fidelity analytics, alerting, and operational management when selecting AMS built on Compass certified platforms. The turnkey storage solution includes L2 / L3 tech support to resolve issues. AMS is delivered with Cyber Shield architecture to drastically reduce the risks of cyber threats to backup storage.

Customer Managed Storage (CMS) provides the option for companies to use existing storage resources with the Compass platform where appropriate. This reduces the overall solution cost but will additionally reduce the operational benefit since the customer must manage all monitoring, maintenance, updates, and security for their customer managed storage.

Compass Differentiators

Compass modernizes data protection by eliminating the complexity of enterprise data protection, providing companies with a simple-to-use, easy-access method to manage their entire environment, receive better reporting, analysis, and insights to help the deliver better results than their existing products deliver.

Automation	Autonomous operations for software, hardware, and operations: currency configuration, tuning, monitoring, problem remediation
Analytics-based optimizations	Continuous capacity/performance/health/security analysis, best practices, and predictive problem avoidance
Enterprise SaaS delivery	Constantly current technology, on-premises and cloud workloads, robust multi-tenant experience with a pay-as-you-grow commercial model
Cyber Shield security	Ransomware readiness/response/recovery data security and governance, no access to backup infrastructure, immutability/containment by design
Multi-cloud maturity	Alibaba/AWS/Azure/Google/IBM/private/hybrid: backup and DR to/in/for/cross cloud
Extreme scalability	Compass Accelerators scale up to 8PB protected data and scale out to any number without additional operational management
Solution assurance	Continuous health monitoring and tuning, problem determination and remediation, defect management, and resolution.

cobalt IRON®

SIMPLE. FLEXIBLE. DEPENDABLE.

Identifying Customers Who Will Benefit

Any organization looking to modernize their data protection environment is a good prospect for Compass. This could be for a number of reasons:

- Environment is too complex
- Environment is too expensive
- Environment is performing poorly
- Looking to move to the cloud and they do not have a data management and protection strategy

Criteria for Ideal Compass Customers

Scalability
- Any customer with over 100TB of data (minimum)

Complementary
- Any enterprise customer that would appreciate simplicity, cyber security, SaaS, and cloud support
- Spectrum Protect customers exploring replacement solutions

Locality
- Customers that have multiple locations: remote sites, data centers, cloud, and on-premises
- Customers looking to backup workloads with multiple cloud providers

Complexity
- Customers that are using multiple point products for different workloads
- Customers that protect diverse platforms and systems: Windows, Linux, Linux on Z, Unix, IBM i, databases, NAS, cloud
- Customers who are challenged with backup currency or other operational pains

Use Cases

Where does Compass play best?

Enhance and Extend Spectrum Protect

Seamless and no-loss migration from Spectrum Protect. Eliminate complexity, increase backup security, deliver as a SaaS solution, and extend data protection to all five top cloud providers.

- Eliminate the complexity for day-to-day management
- Self-updating and optimizing
- Multi-cloud support including Alibaba, Amazon, Azure, Google, and IBM
- Cyber Shield of protection over backup data and infrastructure

Backup Infrastructure Modernization

Hardware and vendor lock-in—as well as dependency on tape, VTL's, and deduplication appliances—are a thing of the past with Compass.

- Modern deployment options for public, private, and hybrid cloud initiatives
- Replace tape, VTL, or aging disk systems used for backup repositories
- Removes dependency on expensive Data Domain and deduplicating products

Cybersecurity for Backup

Eliminate cyber threats to your data protection landscape

- Advanced security features without add-on software
- 99% success rates
- Hands-free infrastructure eliminates people and process access
- Extensive data governance and auditing built in

Enterprise SaaS for Backup

As-a-Service delivery of backup that drives down costs, and increases efficiencies

- As-a-Service delivery of data protection
- Industry leading enterprise scalability and support
- Easy to understand consumption model for data protection
- No additional add-ons or audits

Consolidation of Backup Products

Eliminate the complexity and risk of managing multiple backup products and tools

- Single platform for all platforms and applications
- Deep integration support for all database platforms including Oracle, SQL, SAP, SAP HANA, and DB2
- Deep support for cloud and virtualization platforms

Buyer Profiles

How to start a conversation about Compass with different buyer roles across your customers.

Head of IT

Concerned about

- Pressure on IT budget (having to do more with less)
- Concern about DR preparedness and loss of data
- Concern about regulatory pressures, security risks, GDPR compliance, and audit preparedness

Compass – what to mention

- Compass delivers the best backup cyber security in the market
- Compass allows companies to switch from inefficient CapEx model with upfront over-provisioning of HW and SW to a more efficient OpEx model (pay as you grow)
- Compass improves their backup success rate to 99% with dramatically better DR performance
- Compass ensures that best practices are deployed and maintained enterprise wide, providing the most comprehensive reporting and audit trail information for the entire history of the service

Head of Test and Development

Concerned about

- Having an enterprise class data protection solution for cloud workloads that is easy to deploy, manage, and maintain across all public cloud platforms
- Having a data protection solution that is flexible enough to adapt to changing cloud environments

Compass – what to mention

- Commander provides a simple, centralized dashboard for all consumer services. From control to visibility, all activities are provided without complex training or technology skills.
- Compass delivers multi-cloud support including Alibaba, Amazon, Azure, Google, and IBM

Department Manager / Director

Concerned about

- Complexity of deployment: needs a solution that can integrate with auto provisioning tools to streamline new workloads
- Complexity of management: needs a solution that is easy enough for various stakeholders to self-service basic tasks

Compass – what to mention

- Integrates with most auto provisioning tools (ServiceNow, Chef, Puppet, Ansible, etc.)
- Integrates with Active Directory to automatically define access levels and workflows
- Point and click management through a cloud based dashboard allows for self-service for data protection while ensuring that best practices are consistently used

Introducing Compass to Customers

The Elevator Pitch

The following elevator pitch highlights several key features of Compass including: SaaS, enterprise solution, strong security, automation, time savings, and recovery. **Memorize this statement** to answer customers when they ask "What is Compass?" or as an opening for calls and presentations.

Most companies feel they spend an excessive amount of time and money on backup and get very little in return. Compass is a SaaS data protection platform designed for complex enterprise workloads. Compass delivers the strongest backup data security on the market while automating 80% of the daily management tasks. This allows companies to minimize time spent on backup while operating with confidence that they can quickly recover when needed. **"**

Why Should Customers Modernize?

Compass eliminates the problems of managing the complexity and costs associated with an enterprise backup by modernizing the process using analytics, automation, and cloud-based technology. Some of the benefits that our customers have experienced by modernizing their data protection with Compass include:

- Dramatic reduction in hardware and software costs for backup, typically **50-70%** over legacy environments
- Monitor and **manage the entire backup environment** from an easy to use web console
- **Detailed reporting** options included in the platform
- **Ease of use** — only simple business logic is necessary to operate (point and click vs command line)
- Improved backup performance (**success rates of 99%** vs typical 60%)
- **Easy integration of public cloud** environments: Amazon Web Services, IBM Cloud, Google Cloud Platform, and Microsoft Azure
- Convert **data protection** from CapEx to OpEx

Conversation Starters

Here are a few helpful questions
to get the conversation started.

Costs

In spite of the renewed focus on data, most companies are struggling with the costs associated with data protection. They often view it as "something that they have to do" that doesn't add value to the organization. Therefore, it is not something that they focus on unless they have had a catastrophic event. Some ways to explore the topic with them:

- **Are you currently using Data Domain in your environment?** If so, we could help you migrate off of that platform and save 50%+ for hardware costs using a software defined architecture instead of a purpose built proprietary appliance?
- **Are you interested in moving to Software as a Service (SaaS) model for your backup?** Would your company benefit by shifting backup expenses from CapEx to OpEx?
- **Has your data protection environment become too complex** making it difficult for your teams to manage daily issues?

Modernization

There are many new applications and regulations (GDPR, analytics, cloud, containers, etc.) that are adding more complexity to the data protection landscape. Some areas to explore:

- **How many backup products do you currently have deployed?** Are you finding it more difficult to keep up with it? Are you meeting your backup windows and backup success targets?
- **Do you have tape in your environment?** Are you currently storing tapes offsite? How is that working for you?
- **Are you moving any of your workloads to the cloud?** How do you back up these workloads?
- What would the impact be **if you were able to manage your entire data protection environment from a single, unified console?**

Cyber Security

Use of Cobalt Iron Compass is one of the best and easiest steps companies can take to guarantee their data security from cyber-attacks. Companies are more willing to spend money on security solutions than on backup. Compass has the best cyber security for backup data available in the market.

- If your company were to fall victim to ransomware, **how secure is your backup data?**
- **Do you perform recovery validation testing?** Are you confident that you could meet your RTO/RPOs if needed?
- What measures do you have in place to **protect backup data in the event of a cyberattack?**
- Are all of your backup servers at the most current version of software and security patches? **How often do you update and patch systems?**

Managing Objections

How to handle common objections.

I don't understand the benefits of Compass

- Compass provides major cost savings:
  - **OpEx** Reduces administrative overhead by 90%
  - **CapEx** Predictive modeling and modular architecture allows you to pay as you grow, eliminates HW/SW over provisioning
  - **CapEx** Software-defined architecture uses lower cost hardware including cloud options (Object Storage)
- Compass provides **as-a-Service delivery of the latest technology and enhanced features** with a built-in-the-cloud solution.
- Compass improves overall data protection performance with **backup success rates of 99%+** using analytics and automation to consistently apply best practices across the entire enterprise and all workloads.
- Analytics allow customers to **confidently predict growth and performance** to make intelligent decisions, eliminating fire drills and catastrophic failures.

I can do this in-house cheaper than Compass

- Compass uses technology to continuously monitor and analyze the health of backup operations. This occurs **24x7x365 at a pace and data volume not possible with human resources**.

- Analytics and automation take people out of the process of day-to-day management and maintenance of the backup infrastructure.
- Analytics ensure that **best practices are consistently deployed** and problems are identified before they become critical, eliminating downtime and costly data loss.
- Compass automation **frees up critical IT resources** to focus on new projects and innovation.

Isn't this just another managed service?

- Compass solution is **not a managed service** that uses off-shore resources to manually manage your data protection environment.
- **Compass is a software-defined solution** leveraging Lenovo compute and IBM storage.
- Compass leverages analytics and automation to meet growing business requirements without the need for additional IT staff.
- Compass delivers **automatic updates** ensuring that backup infrastructure is running the latest versions of software, OS, BIOS, and security.
- Compass eliminates the operational burden while leaving the **customer in full control** of the policy decisions about their data protection.

The Competition

Compass is a complete data protection solution that is a strong competitor against other products on the market. Below are some specific weaknesses to explore when selling against the competition.

Versus EMC

- Aging, complex, disparate hardware and software portfolio
- Production EMC feature gaps leaves customers to look elsewhere
- Complexity reduction failing to meet needs
- Incomplete integration of Avamar, Legato, and Data Domain
- Expect 3 to 5 years of up-front over-provisioning
- Heavy administrative and operations overhead with Avamar/Data Domain 'box' management
- PowerPlatform is a rebundling of a set of products
- Cloud strategy is incomplete
- Lack of data reuse options
- Networker requires PowerProtect DD (Data Domain) for deduplication. Many DD features require hardware, not virtual
- Misleading deduplication ratios, calculated as if all backups are fulls but they are not (they are a form of progressive incremental)

Versus Veritas NetBackup

- Limited deduplication effectiveness can drive storage requirements three times higher depending on applications
- NetBackup's integration with database applications is not as seamless and requires additional work to set up
- NetBackup appliances do not deploy continuous data integrity checking and still require management
- Does not provide the ability to catalogue, index and discover snapshots not created by Networker
- No trust in Veritas (audits, support issues, on-going hollow promises)
- Cloud strategy is incomplete
- 360 Platform is over six products
- Complexity still an issue for many customers
- Awful reports from customers around Veritas support
- No native scale out
- Requires appliances to dedupe at scale

Versus Commvault

- High cost and complexity when scaling above 250 TB
- Limited integration with VM environments, inability to load balance
- Limited deduplication capabilities (can only dedupe with aligned data pools)
- Appliance is pre-installed software on another vendor's hardware
- No true automation between multiple sites or domains
- DR features are limited
- Hyperscale product is very problematic and operationally complex
- Metallic is seen as competitive to MSP's, limited in features, and separate for other Commvault products
- Poor data density, requires multiple servers
- Complex to deploy and use, almost always sold with services

More Competition

Versus Veeam

- New capabilities are not mature and selling futures to customers
- Very limited enterprise penetration/expansion
- Signs of channel fatigue
- Analysts skeptical of public reports
- Technology for storing data lacking requiring hardware appliance support
- Complex licensing
- Requires multiple servers, VMs, and MSSQL Server
- Limited platform and cloud support

Versus Rubrik

- Focused on virtual workloads
- Complex environments require PowerShell scripting
- No answer for production slowdown during backup
- VM stun a major issue in highly leveraged production environments
- Capability not broad or mature for most enterprises
- Rapidly losing sales talent and experiencing a management team shake up
- Nodes have limited storage causing scale-up challenges
- Self service requires third-party integration
- Weak array integration
- Complex architecture leads to poor data density (space/power per TB) and high infrastructure costs
- Very expensive storage boxes with limited data protection capability

Versus Cohesity

- Technology does not support the story they tell
- Many capabilities are not mature for customer use
- They are confused as to what they do. Are they a file system? Are they a backup and recovery product?
- Lacks tightly integrated tape, object, and multiple disk tiers
- Weak array integration
- DataPlatform VE is limited in capacity and compute (16TB/12vCPU/64 GB RAM max)

- Nodes have limited storage causing scale up challenges
- Complex architecture leads to poor data density (space/power per TB) and high infrastructure costs
- Offload to tape requires Qstar
- Built in technologies require additional licensing (such as CloudSpin)
- Very expensive storage boxes with limited data protection capability

Engage the
Cobalt Iron Sales Desk Today

The Cobalt Iron team is ready to help you deliver value to your customers and success to your bottom line. Our team can assist with all aspects of finding and closing the deal from

- Account planning
- Customer profiles
- Presentations
- Technical discussions

- Sizing, pricing
- Proposals
- And more

**Call today
to schedule a one-on-one
account planning session
with your Cobalt Iron
Sales Representative**

**Don't have a sales
representative yet?
Reach out to:**

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