

Investor Day at  
**CISCO** *Live!*

# Reimagine Collaboration & Security

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Security & Collaboration

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# Connecting and protecting people and workplaces

Cisco Collaboration Business

# Our opportunity

## Massive TAM

# \$90B

Source: : IDC, Gartner, Dell'Oro, Synergy, 451 Research, 650 Group, Cignal AI, LightCounting & Internal Cisco Estimates. These TAMs are based on limited information currently available to Cisco, which is subject to change. Actual results may differ materially due to a variety of factors listed in Cisco SEC filings, including business and economic conditions.

## Market trends

- Massive collaboration market across Conferencing, Calling, Devices, Contact Center.
- AI has created a CEO-level imperative to transform Customer Experience.
- Hybrid Work and AI peripherals creating a large device refresh opportunity as enterprises mandate "return to office."

# Webex Platform

Reimagining employee and customer experiences



Reimagine workspaces



Reimagine work



Reimagine customer experience



Artificial Intelligence



Security



Manageability



Interoperability



AI-POWERED PLATFORM

# Two growth drivers



Interoperable  
devices



AI-powered  
Contact Center

Even though employers and **employees are ready for the return to the office**, the **office is not ready**.

80%

of employers are mandating a full or partial return to office

72%

of employees are positive about going back to the office

Need to make the **office a magnet, not a mandate**

# Distance Zero for any workspace

- Collaboration devices
- Networking and sensors
- Smart building technology



# Cisco devices for every workspace



Cameras &  
Headsets



Desk Phones



Desk Series



Board Pro G2



Room Bars  
& Room Kits



Room Kit EQX

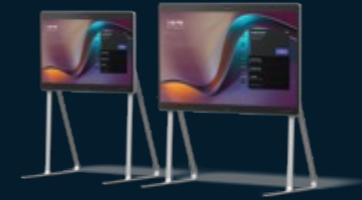
AI-POWERED | INTEROPERABLE | SUSTAINABLE

A complete portfolio  
of devices certified  
for Microsoft Teams

## INTEGRATED SYSTEMS



Desk Pro  
Teams Rooms GA now  
Teams display Q2 2024



Board Pro 55/75 G2  
Board Pro 55/75



Room Kit EQX

## VIDEO BARS & KITS



Room Bar



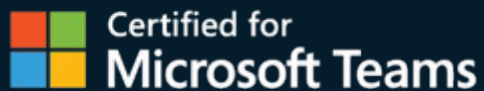
Room Bar Pro



Room Kit EQ



Room Kit Pro



# Multiple demand drivers for the collaboration portfolio

Conference room and workspace upgrades



Completed refresh of portfolio with next-generation rooms, phones, and headsets

One-click interoperability with Microsoft, Google, Zoom



Everyone can benefit from device-level AI innovation regardless of what meeting solution they use

Broad hybrid work transformations



Enhanced office, branch, and home experiences by integrating across Cisco portfolio

Video device unit sales volume has gone from negative growth in FY23 to positive double-digit growth in FY24

# AI-powered self-learning Contact Center



Proactive communications



Self-service



Human interaction



Webex Platform

The collaboration portfolio is a key part of Cisco's strategy to **connect and protect people and workplaces in the AI era.**

# Reimagining security in the AI era

Cisco Security Business

# Our opportunity

## Massive TAM



**\$118B**

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## Market trends

- Attacks are getting more sophisticated, and security is too complex.
- The move to hyper-distributed architectures is accelerating. Traditional security approaches will not work.
- Preventing lateral movement is critical in a world where we must assume an attacker is already in.

# Our differentiated strategy



## Platform shift

Move from point solutions to a platform with deep hooks into infrastructure.



## Hyper-distributed security

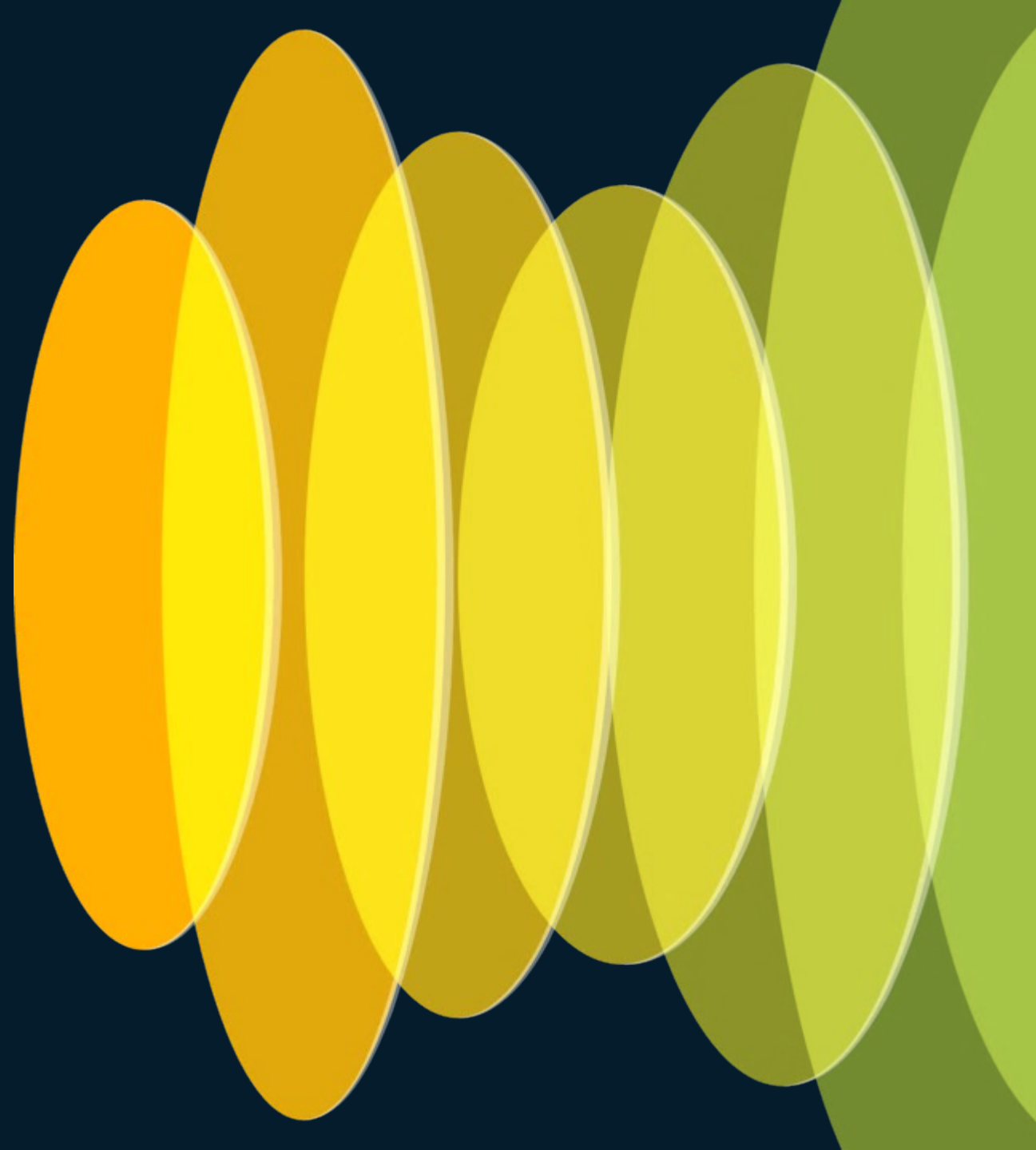
Security infused into the fabric of the network with a completely reimagined approach.



## Extend leadership in SOC

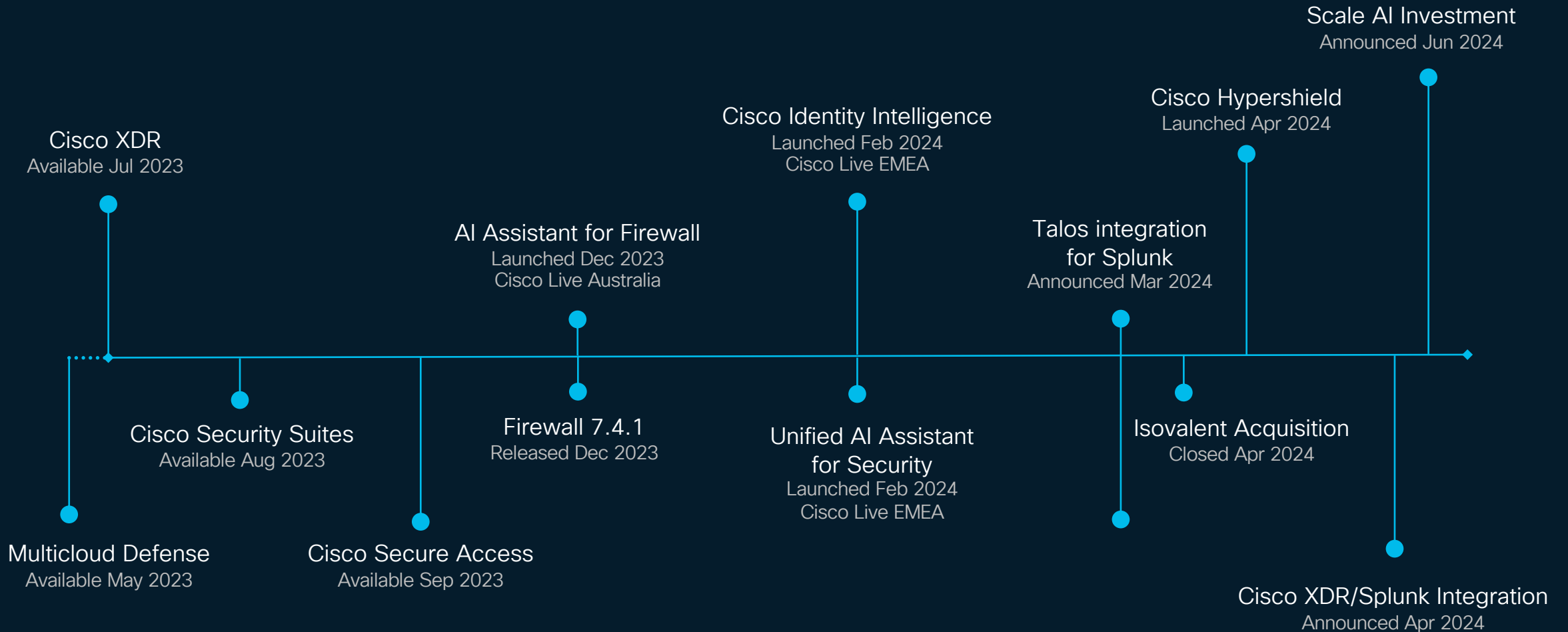
Leverage Cisco + Splunk's depth and breadth of telemetry to prevent, detect, and respond to sophisticated attacks.

# Platform shift



# Highly accelerated innovation

Delivering on the **Cisco Security Cloud** vision



# Addition of Splunk establishes Cisco as a leader in the SOC

## 10th consecutive time as a Leader

### Gartner® Magic Quadrant™ for Security Information and Event Management

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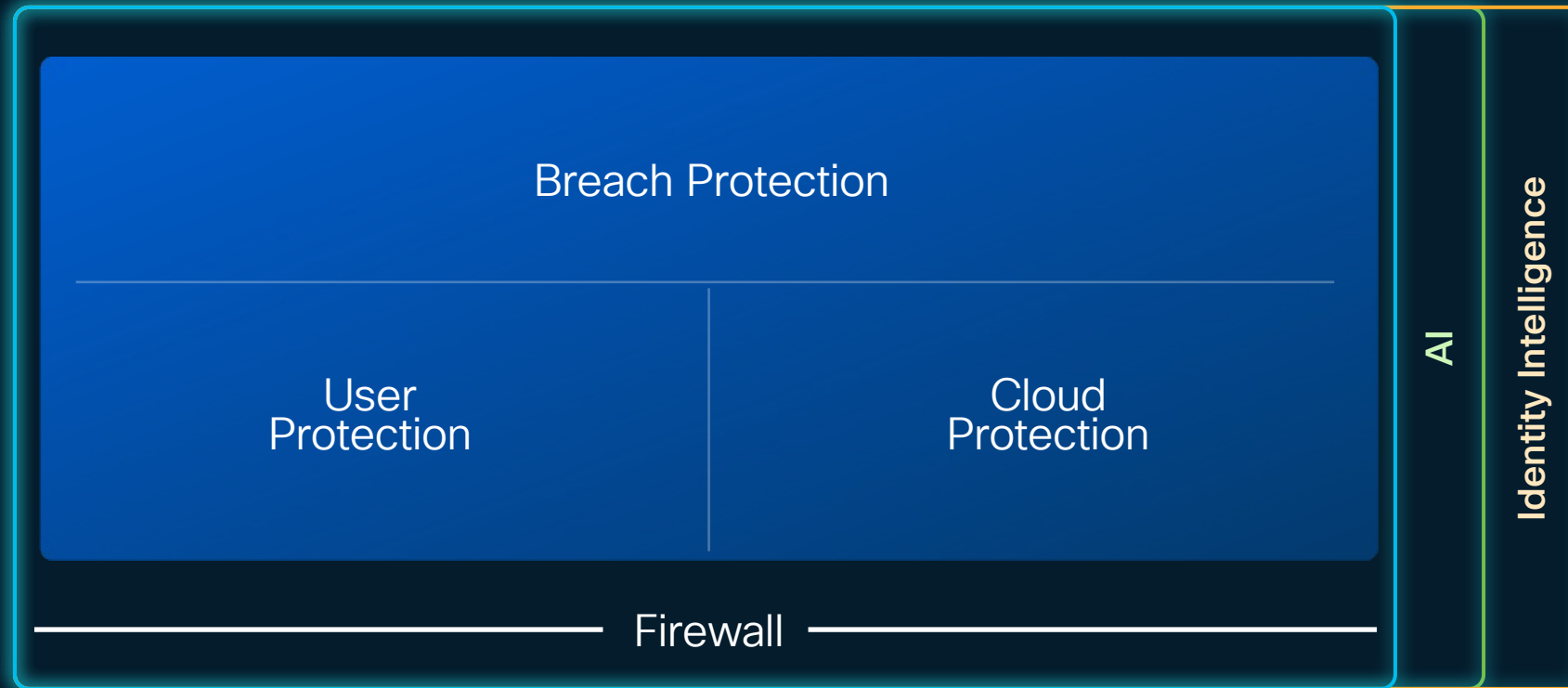
This graphic was published by Gartner, Inc. as part of a larger research document and should be evaluated in the context of the entire document. The Gartner document is available upon request from Splunk.

Figure 1: Magic Quadrant for Security Information and Event Management





# Cisco Security Cloud

AI-powered, integrated platform designed to improve security efficacy, experience, and economics



Now supercharged with **Splunk**

# Suite expansion over time

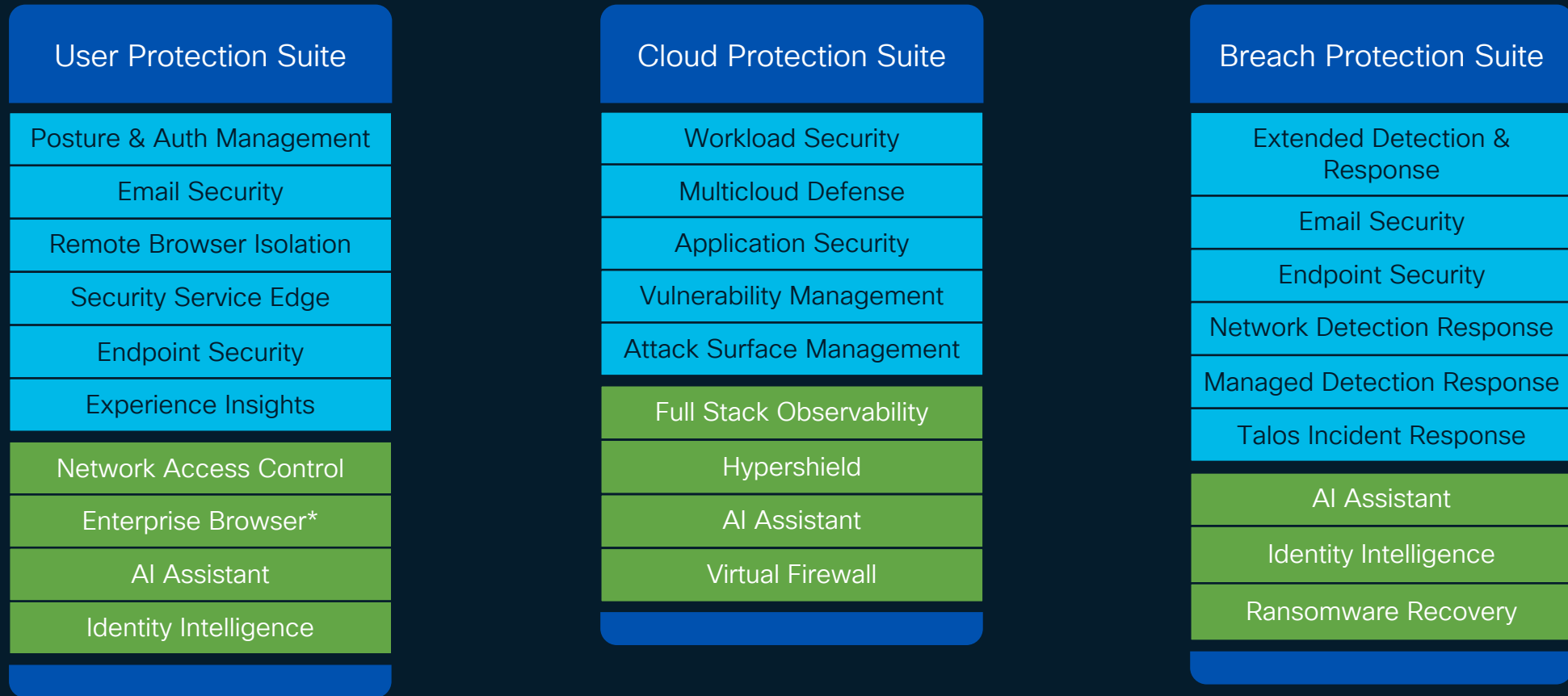
 Included  
 Coming Soon



← Firewall →

# Suite expansion over time

■ Included  
■ Coming Soon



← Firewall →

# Anchor products drive suite sales

Suites	Lead Product	Differentiation
User Protection	<b>Cisco Secure Access</b>	<ul style="list-style-type: none"><li>• One simple, secure experience for users to access private, public, and SaaS applications</li><li>• Leverages Cisco's massive VPN install base as an upsell opportunity</li></ul>
Breach Protection	<b>Cisco XDR</b>	<ul style="list-style-type: none"><li>• Real-time threat detection and response without complexity</li><li>• Leverages Cisco's extensive email, web, endpoint, and network telemetry</li></ul>
Cloud Protection	<b>Cisco Hypershield</b>	<ul style="list-style-type: none"><li>• Native AI capabilities enforce security everywhere an application or device exists</li><li>• Leverages Cisco networking presence and leapfrogs competitive market offerings</li></ul>
Firewall		<ul style="list-style-type: none"><li>• Complete family of products at different price points for data center, campus, branch, etc.</li><li>• Important security enforcement point creates upsell opportunity into security suites</li></ul>

Each anchor product represents a **land-and-expand opportunity** for the rest of the Suite and security portfolio

# Winning in Network Security

## Secure Firewall 1200 Series

- Up to 3x the performance of comparable firewalls
- Price/performance leader for branch firewalls



# New products leading to new wins and changing market perception

## XDR

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Large U.S. municipal healthcare provider

Integrating multiple vendors for correlated detections.

Large U.S. public university

Correlated telemetry of curated third-party integrations.

UK's leading value retailer

Executing a 5-year security transformation with XDR.

## Firewall

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Global multimedia conglomerate

Strategic need for a more cohesive, innovative, and integrated security platform to enhance resiliency.

India-based multinational software company

Focused on insights, ease of use and scalability. Met compliance requirements for deep packet inspection at scale.

## Secure Access

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Large global clinical laboratory network

Leveraging existing infrastructure and investments. Integration with Cisco Identity Services Engine to enable robust segmentation.

Major U.S. adhesives manufacturer

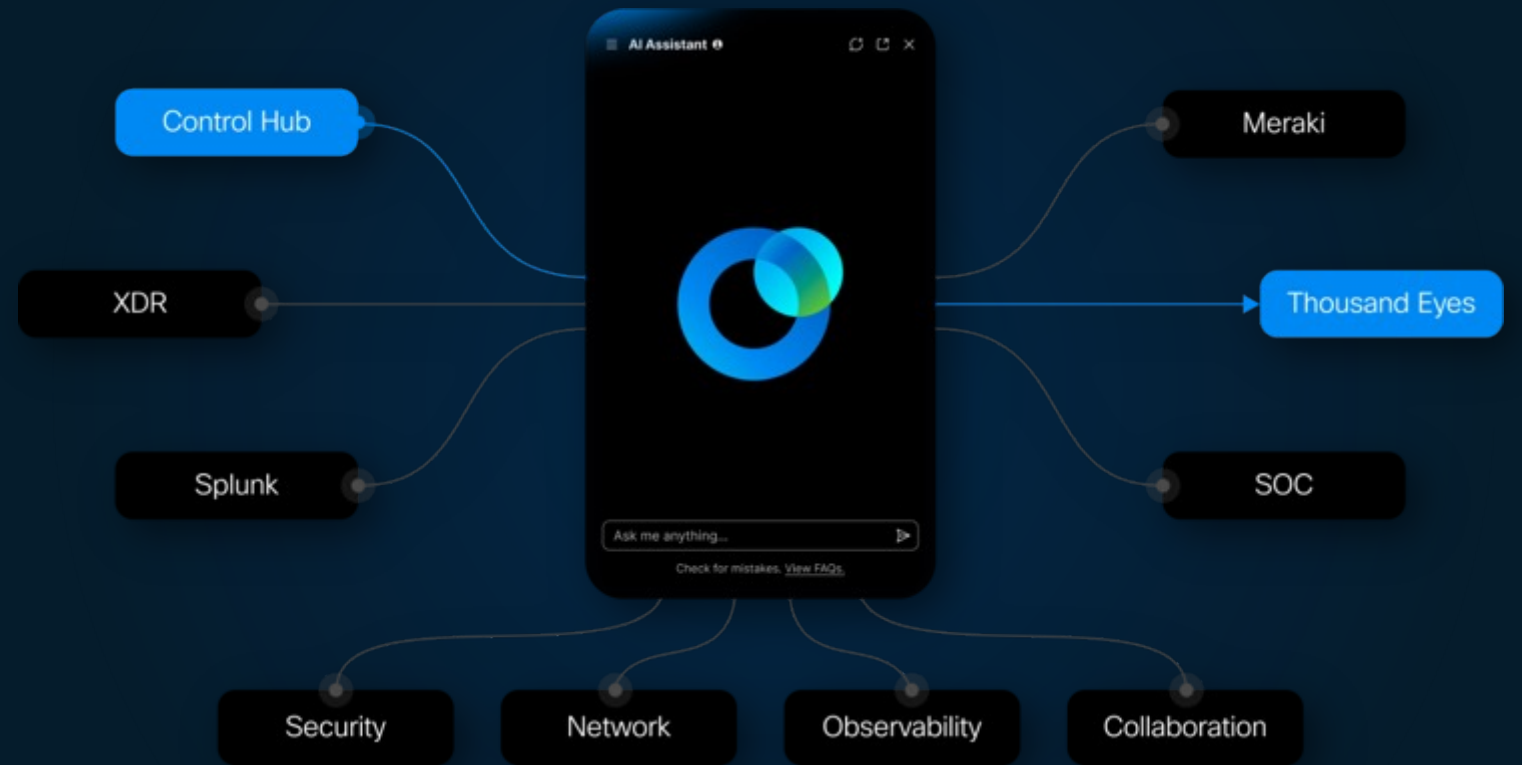
Delivering platform value by consolidating the endpoint experience with robust integrations with Cisco XDR.

Top 10 global software company

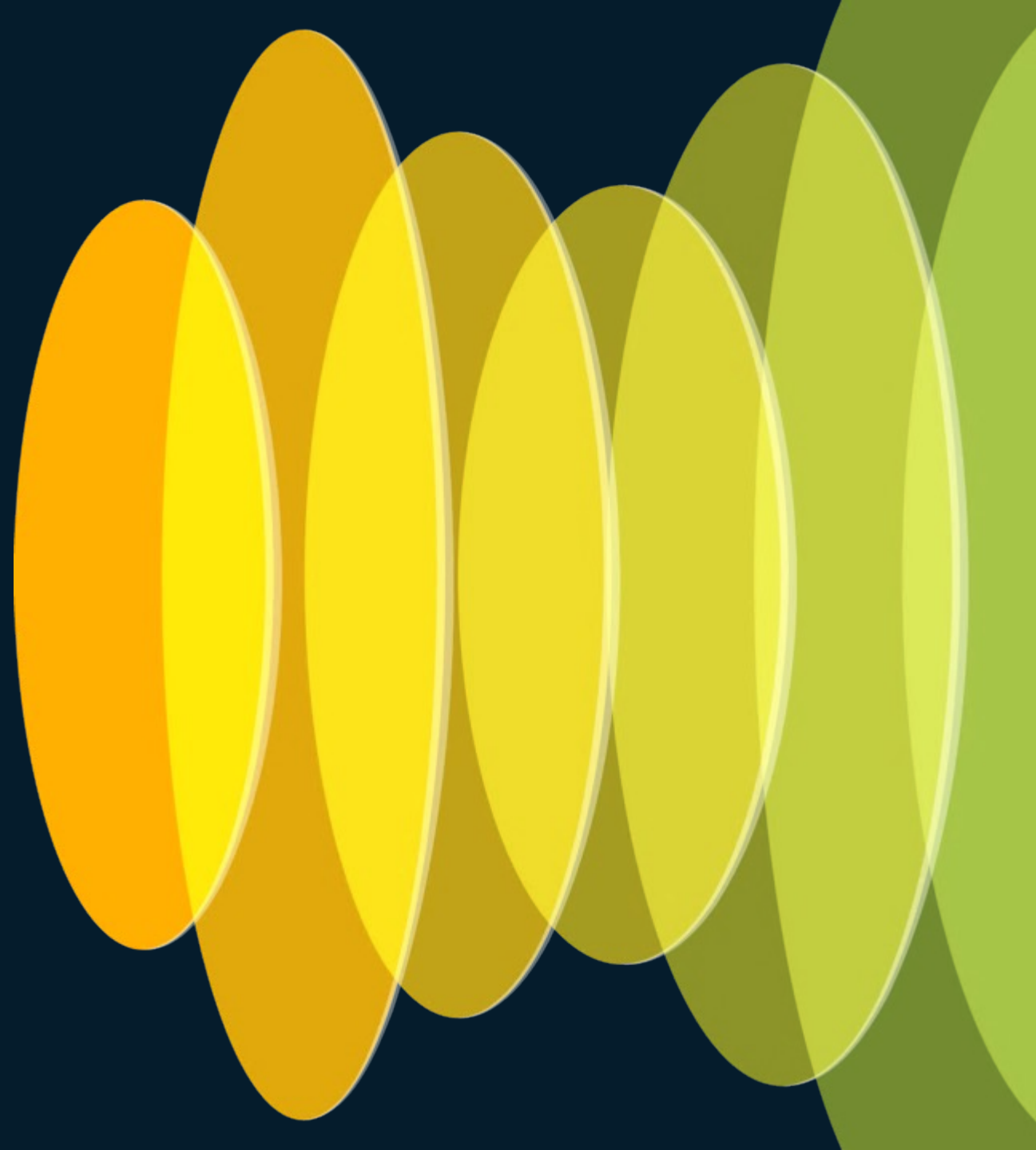
Differentiated and expanded use cases combining Secure Access with Multicloud Defense.

# Cisco AI Assistant

Skills enable differentiated cross-domain insight



# Hyper- distributed security



An increasingly hyper-distributed  
and encrypted world requires a  
**reimagined security architecture**

Segmentation  
is hard



Segmentation  
is hard

Patching is  
hard

ANNOUNCED

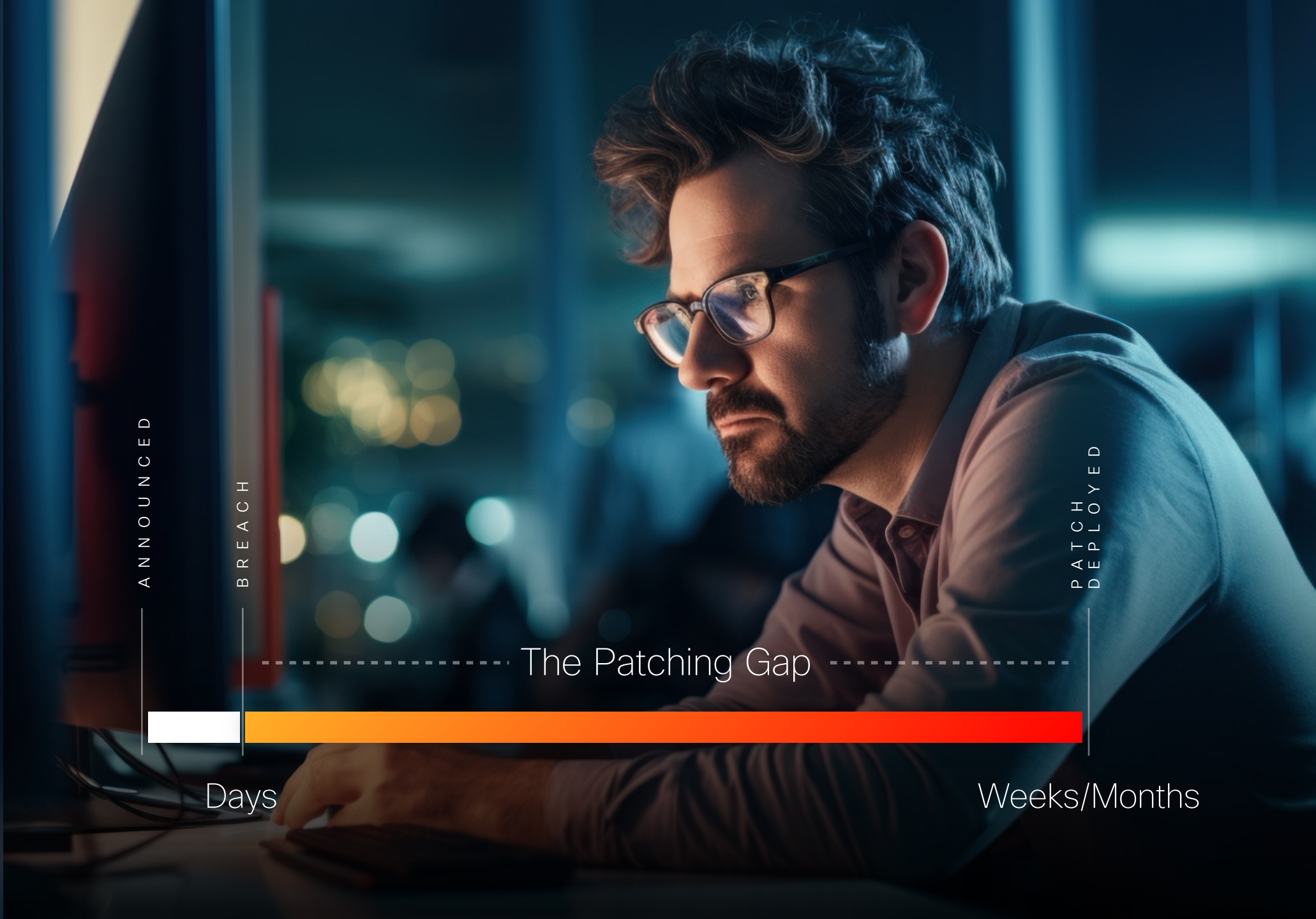
BREACH

PATCH  
DEPLOYED

The Patching Gap

Days

Weeks/Months



Segmentation  
is hard

Patching is  
hard

Upgrading  
is hard



# New building blocks

AI

Kernel-level visibility

Hardware acceleration

**New**  
**Cisco Hypershield**

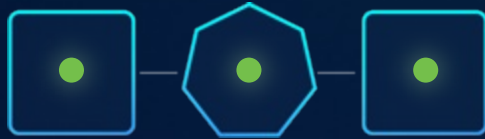
**AI** scale

**Cloud** native

Highly **distributed**

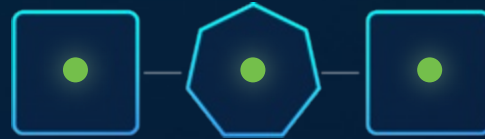
# **Security infused** into the network fabric

Public Cloud



C L O U D   N A T I V E  
S E R V I C E S

Private Cloud



S W I T C H   /   S E R V E R

IOT/OT



S W I T C H

## Architecture supports multiple enforcement points

- In the cloud with eBPF agents
- In infrastructure with DPUs in switches and servers

# Cisco Hypershield **reimagines security**



Segmentation is hard



Autonomous segmentation



Patching is hard



Distributed exploit protection

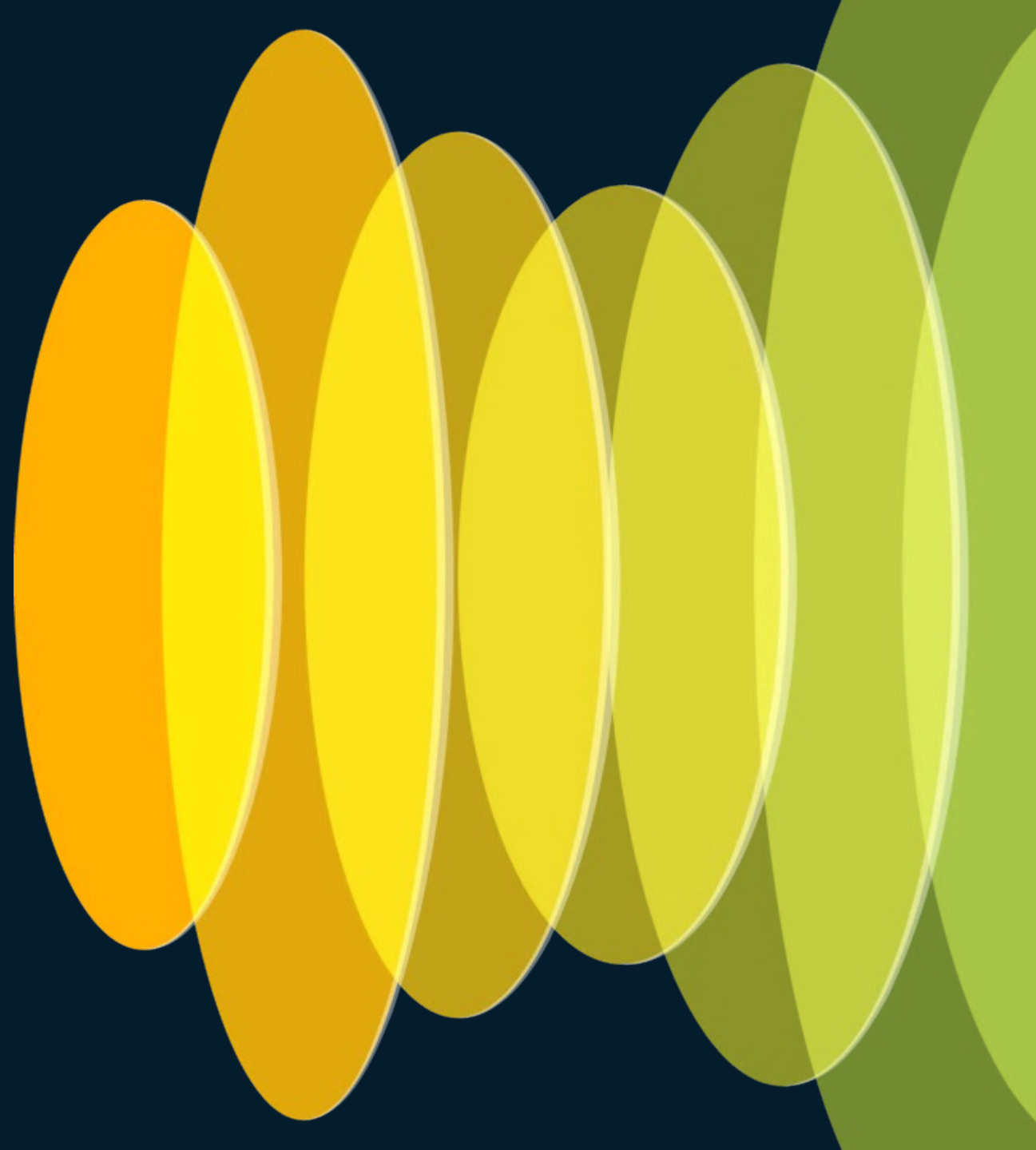


Updating is hard



Self-qualifying upgrades

# Extend leadership in SOC



Security is a **data problem**.

Cisco combined with Splunk can **see, correlate, and analyze more** security telemetry and threat intelligence than anyone.

# The path to a more efficient and responsive **Threat Detection, Investigation, and Response** capability

## Cisco + Splunk

**XDR:**  
Foundational  
detection and  
response

**SIEM:**  
Broadened  
insights and  
investigation

**SOAR:**  
Playbook  
automation &  
orchestration

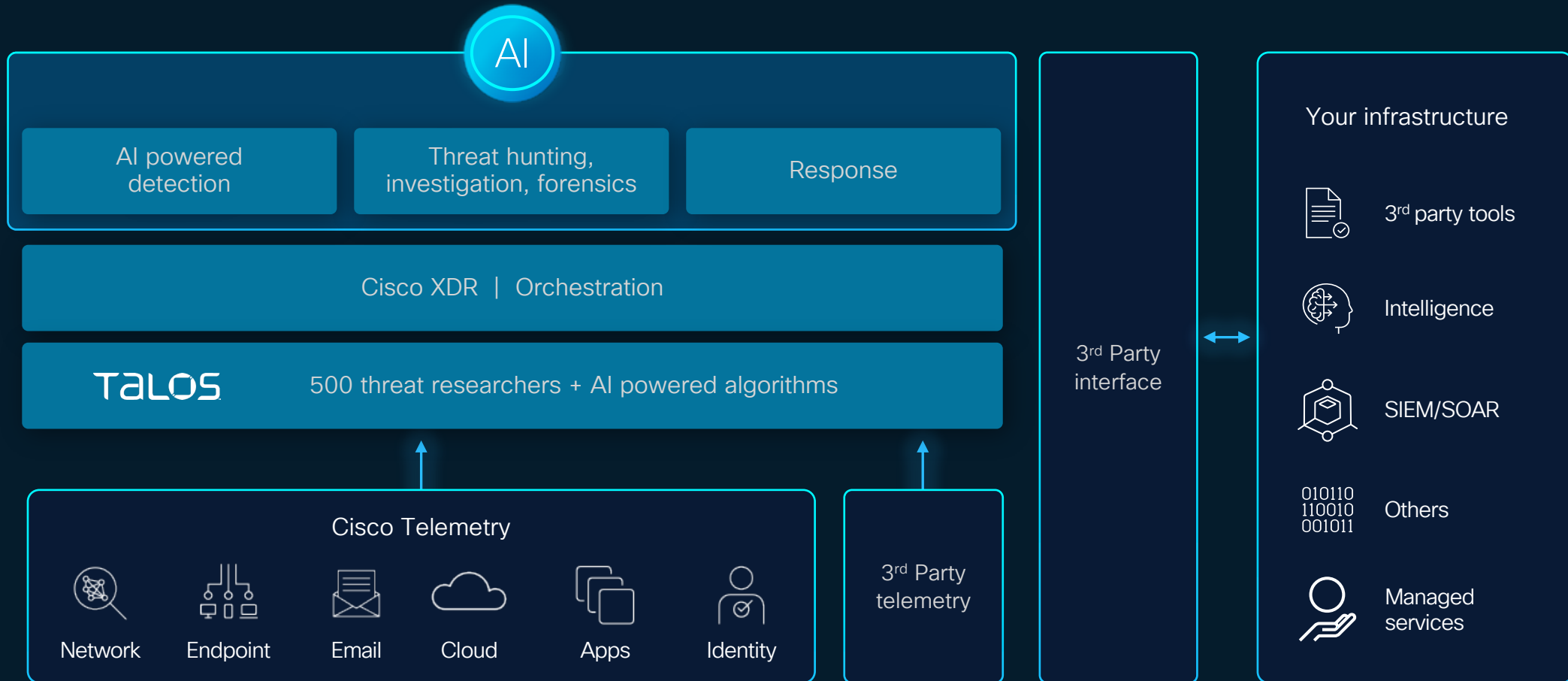
**Unified TDIR:**  
Maximize  
SOC efficiency

**AI Guided**

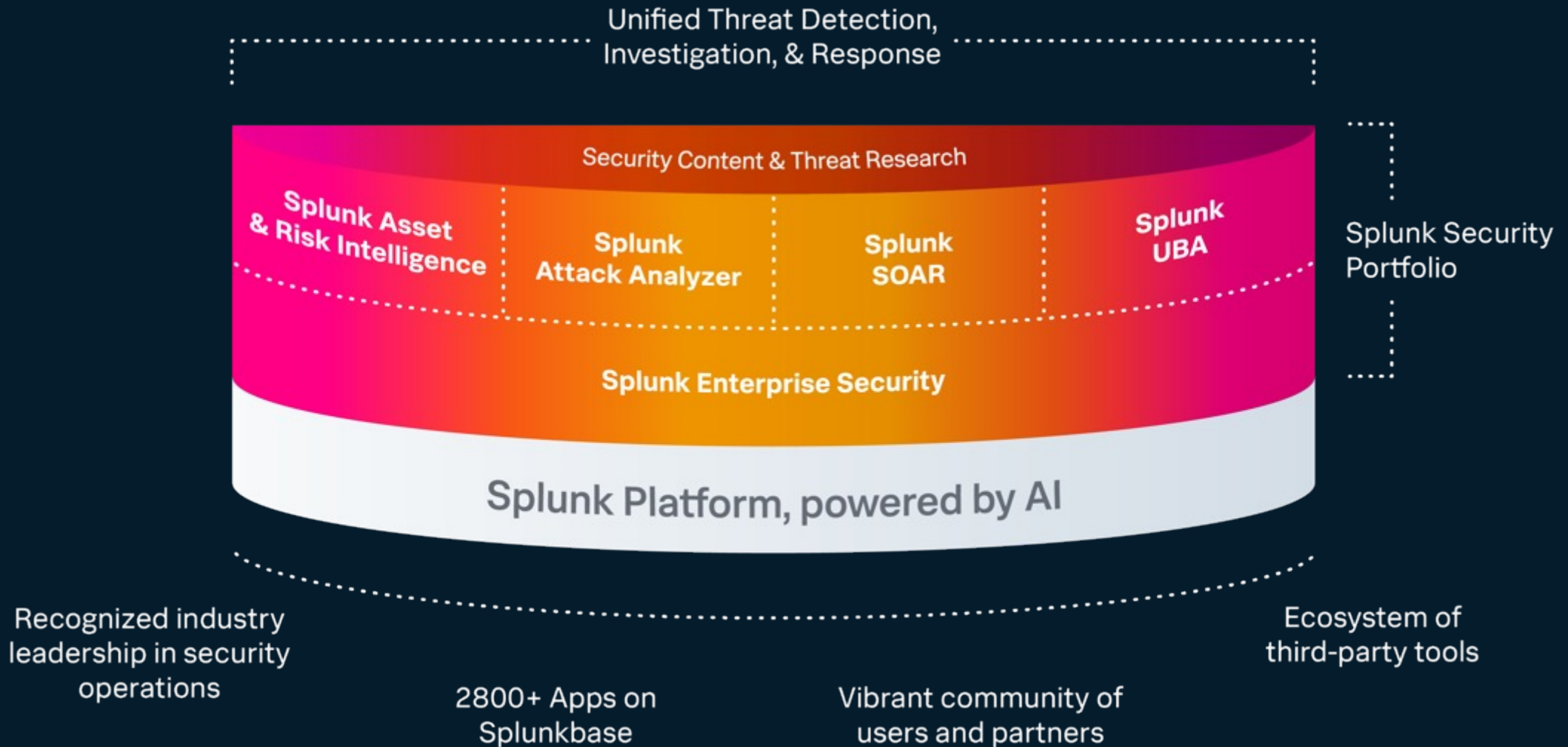


We can meet customers **wherever**  
**they are** on this journey

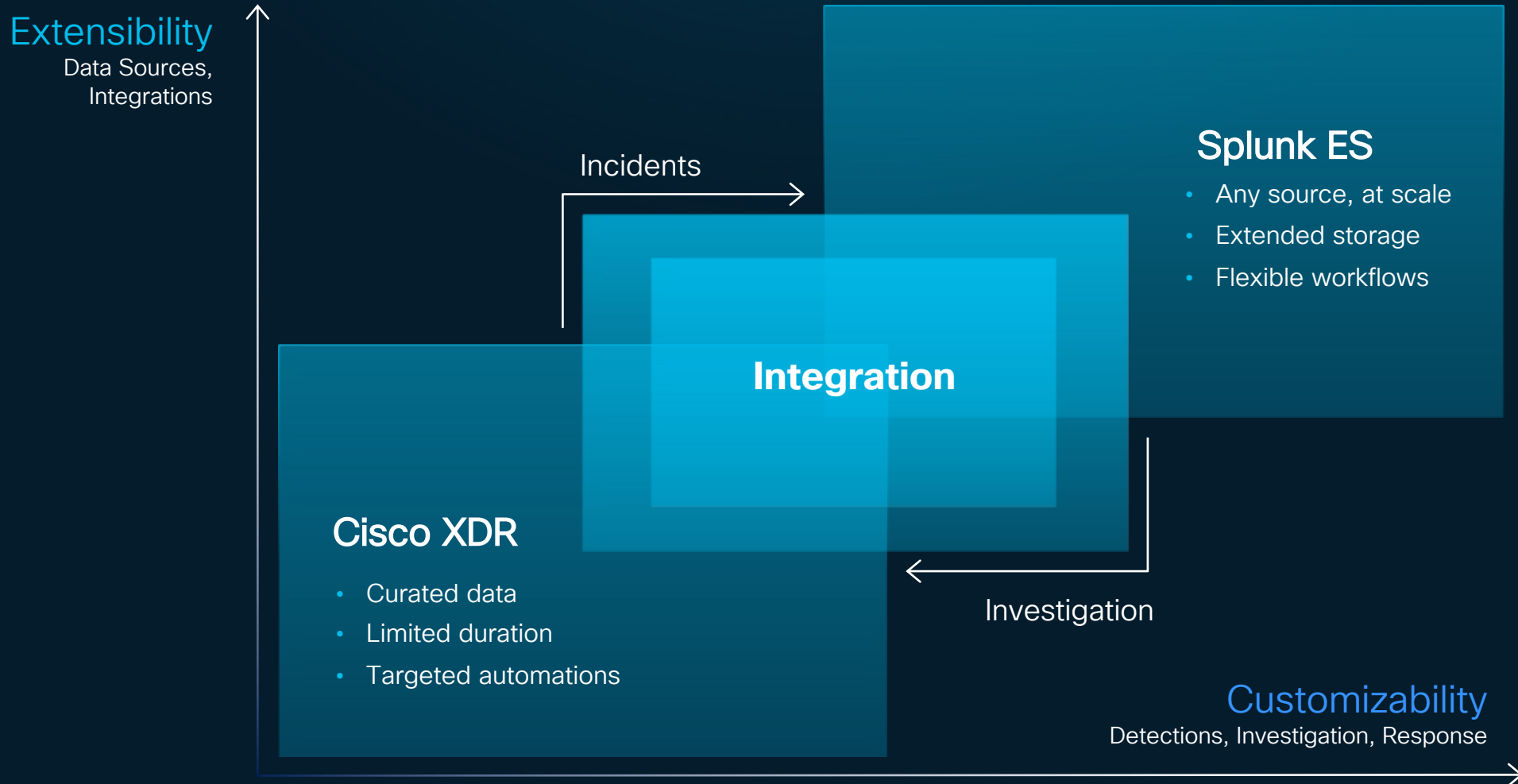
# Customers can start with XDR



# Splunk powers the next stage of their security journey



# Cisco XDR + Splunk support full SOC maturity journey



# Enabling powerful security outcomes for customers

**<15 min**

Execute a  
phishing  
investigation

**90%**

reduction  
in alert  
volumes

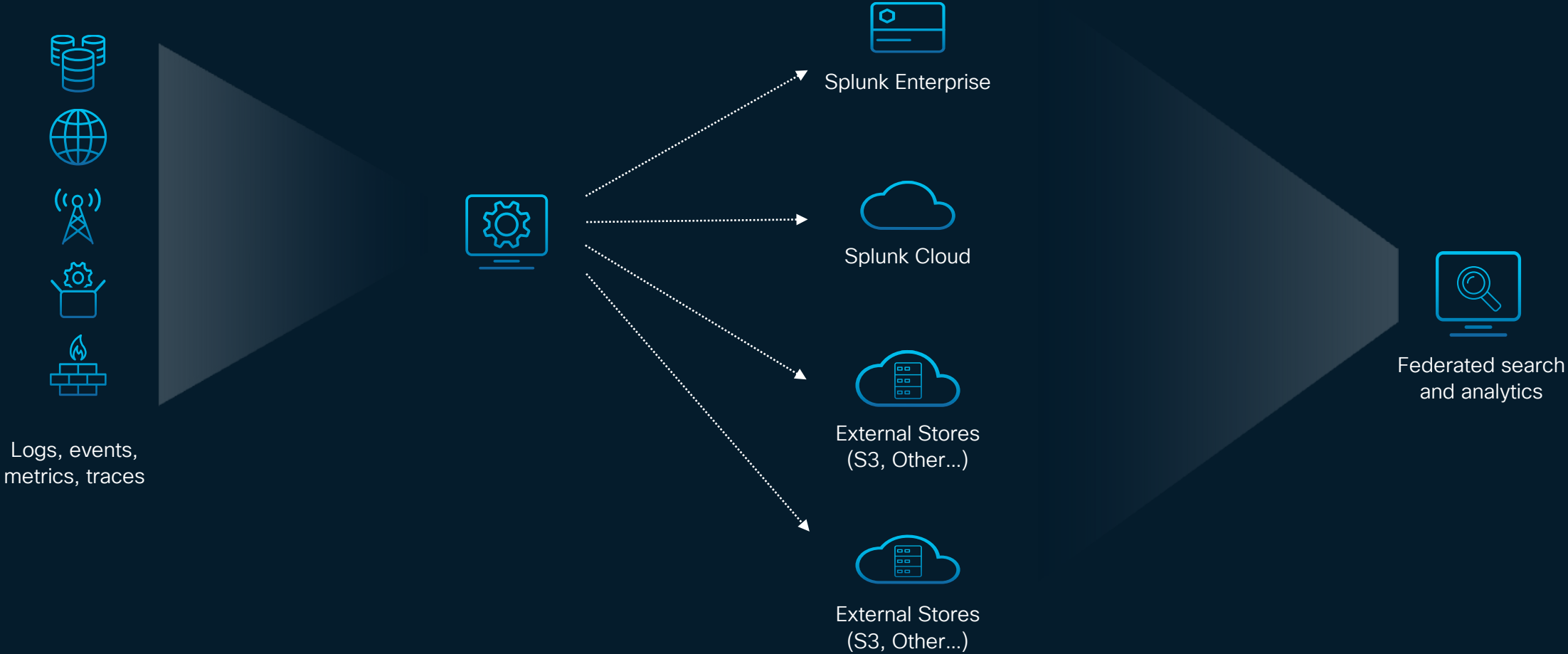
**5x**

faster detection  
& response to  
threats

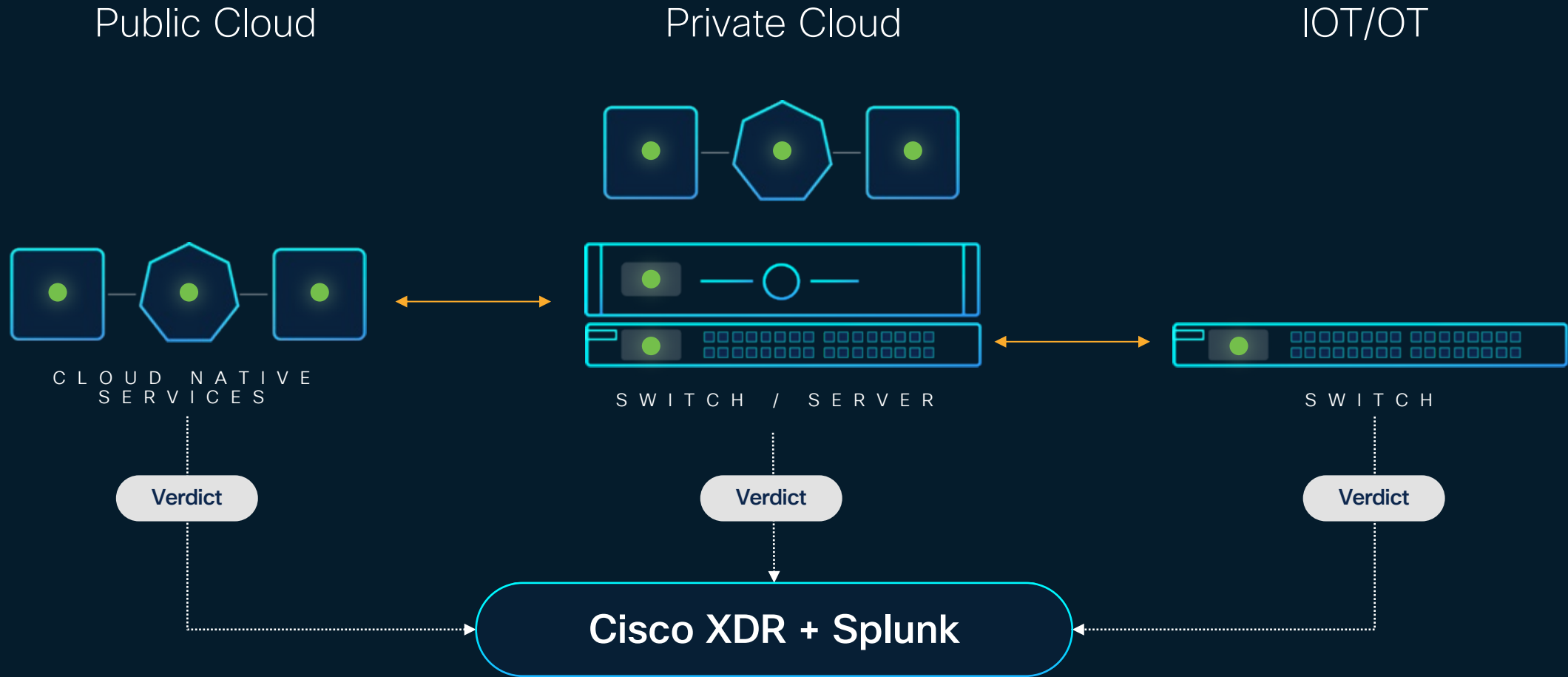
**Network telemetry** is critical to stopping lateral movement, but **too voluminous for a SIEM.**

To prevent future threats we need to **move analytics to the data**, not the data to the analytics.

# Splunk can search and analyze data wherever it lives



# Leveraging Hypershield to **reimagine security analytics** in the future





010110  
110010  
001011

Data



Network



Platform

Investor Day at  
CISCO *Live!*

**Thank  
you**



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