

License to win - with CAD

Opportunities in AEC and Product Development Sean Young / December 16th, 2014

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What you'll learn in this session

- Industry overview
- Value prompters
- Segment strategy
- ISV landscape
- System and config recommendations





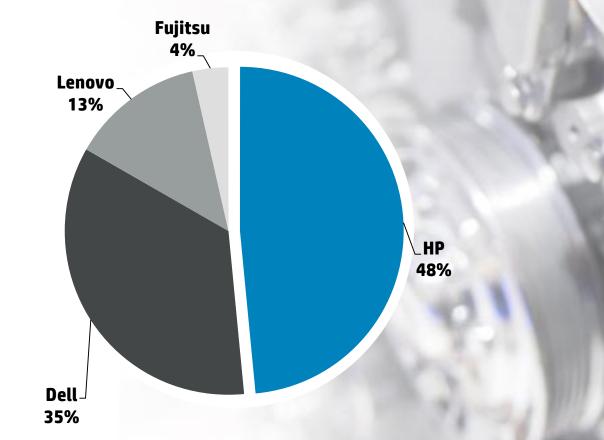


HP's Leadership in AEC and Product Development

WW Engineering Segment Market Share

IDC Q3'14 WW WS Tracker, Q3'14 WW Units, Desktop & Mobile Workstations, Engineering segment

 HP leads the Engineering Segment worldwide by 13% over Dell and 35% over Lenovo



AEC/PD market nomenclature





Factory-Design Real-Estate

*Source: Calculations based on estimated ASP and upgrade cycle, and Cambashi 2013 revenue projections for CAD software, used with permission.



6M

Million

Users*

The evolution of CAD: 2D to 3D



2D (yesterday)



3D (today)



Workstation benefits for AEC & Product Development





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Processor

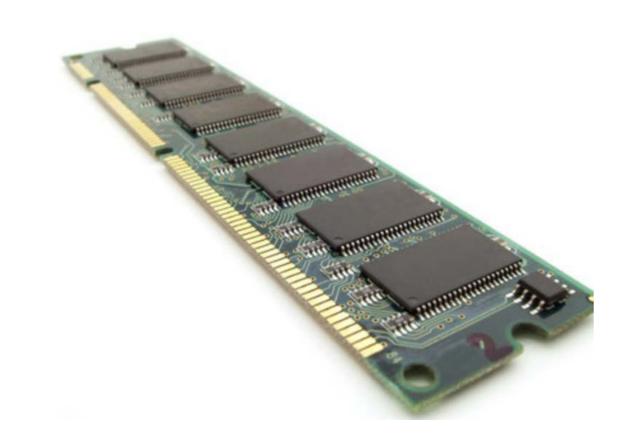


Processor (CPU)

Clock speed is a top priority for CAD. Multiple CPU cores boosts multi-threaded processes such as rendering and simulation.



Memory



Memory (RAM)

16 GB of memory is recommended for CAD, and 32 GB is recommended for complex datasets. ECC (**Error Correcting Code**) memory is important for precision

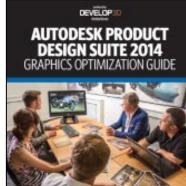
Storage



Storage (Hard Drives)

Z Turbo Drive dramatically accelerates read/write processes, particularly with large datasets such as point clouds and animations.

Graphics



protocol by W and Millow 6) 🧟

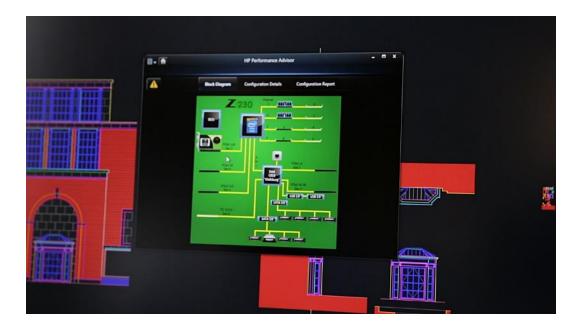


Graphics Processing Unit (GPU)

A professional GPU is required for 3D modeling interactivity, realistic reflections, shadows and complex lighting. For complex datasets and realtime visualization consider a with more video memory. GPU compute can be an option for simulation and rendering.



Why an HP Z Workstation?





HP Performance Advisor



Identify performance bottlenecks

Ensure top performance throughout the entire life of your workstation with quick and easy performance analysis.



Top performer. Tuned for AutoCAD Maximize your entire workstation environment with HP Performance Advisor.



Complete system view at your fingertips Gain a quick and accurate understanding of your entire system in one simple, intelligent interface.

HP Remote Graphics Software



 Workstation class mobility even on a tablet
 Remote workers

 Get complete remote access to the full power
 Professionals can connect to their HP Z Workstations

 of your workstation and your professional
 from remote computers at any location.

 workstation-class applications when off-site,³ even
 when using a tablet.⁴





Real-time collaboration Share your workstation screen with multiple users simultaneously—grant view-only or full interactive access.



Recommended configurations (and US Smart Buys)

	Z230 SFF	HP Z440	HP Z840	HP Z1	HP ZBOOK 15	HP ZBOOK 17
Processor	Intel® Xeon® E3-1241	Intel® Xeon® E3-1630	2X Intel® Xeon® E5-2687	Intel® Xeon® E3-1281	Intel® Core™ i7-4910	Intel® Core™ i7-4910
	v3 (3.5GHz, 4 Core)	v3 (3.7GHz, 4 Core)	v3 (3.1GHz, 10 Core)	v3 (3.7GHz, 4 Core)	(2.9GHz, 4 Core)	(2.9GHz, 4 Core)
Memory	16GB DDR3	32GB DDR4	128GB DDR4	16GB DDR3	16GB DDR3	16GB DDR3 1866MHz
	1600MHz ECC RAM	2133MHz ECC RAM	2133MHz ECC RAM	1866MHz ECC RAM	1866MHz SDRAM	SDRAM
GPU	NVIDIA® Quadro®	NVIDIA® Quadro®	NVIDIA® Quadro®	NVIDIA® Quadro®	NVIDIA® Quadro®	NVIDIA® Quadro®
	K620 (2GB)	K4200 (4GB)	K6000 (12GB)	K4100M (4GB)	K2100M (2GB)	K4100M (4GB)
Storage	Z Turbo Drive	Z Turbo Drive	Z Turbo Drive	Z Turbo Drive	Z Turbo Drive	Z Turbo Drive 256GB
	256GB	256GB + 1TB SATA	512GB + 1TB SATA	256GB + 1TB SATA	256GB + 1TB SATA	+ 1TB SATA

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Virtualization benefits

• IT Manager

- Resource management
- Increased security and control
- Deployment

• End-User

- Mobility
- Data transfer speed
- Performance



DL380Z certifications







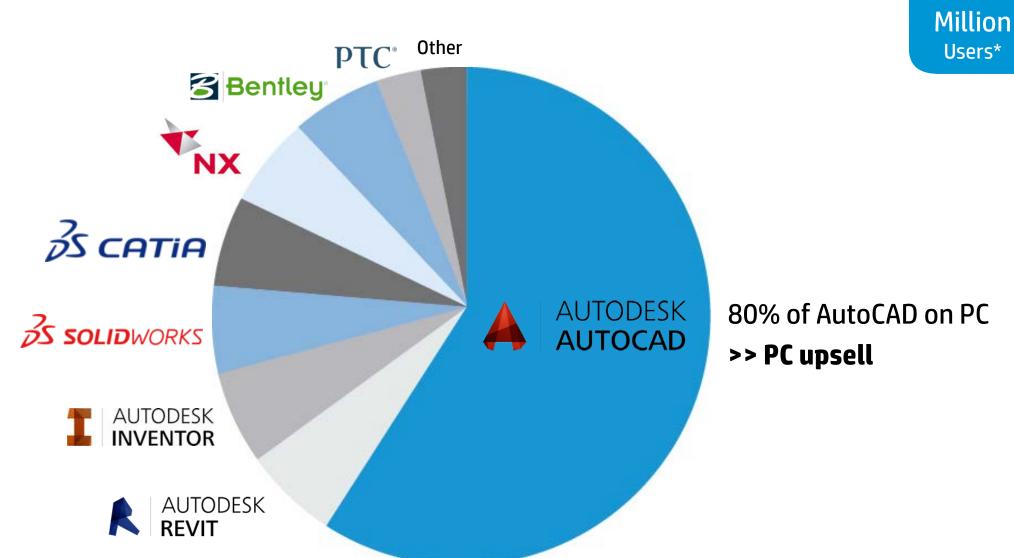




AEC & Product Development ISV Landscape / Strategy

2015

Business opportunity – by the numbers



*Source: Multiple sources. "Other" is actually larger than it appears on this slide, but it is not a 'market' we can address presently. © Copyright 2014 Hewlett-Packard Development Company, L.P. The information contained herein is subject to change without notice.



11M

AEC + Product Development = 5M TAM, 11M TPM

• SOURCE: IDC WW WORKSTAION SALES IN ENGINEERING, 2010, 2011, 2012 = 5M



*<u>Source</u>: Calculations based on estimated ASP and upgrade cycle, and Cambashi 2013 revenue projections for CAD software, used with permission. Assuming a 3-yr refresh rate.



Product Development segment



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HP in Automotive



75 years HP has more that 75 years experience in the manufacturing industry



30 years

HP has more than 30 years of industry experience in PLM and Manufacturing Execution Systems (MES)





HP manages 85,000+ Product Lifecycle Management (PLM) seats globally

Unmatched industry expertise



HP responds to more than five million automotive help desk calls annually including roadside services, vehicle diagnostics, repair and

HP helped a large automotive OEM save \$1 billion with a PLM solution

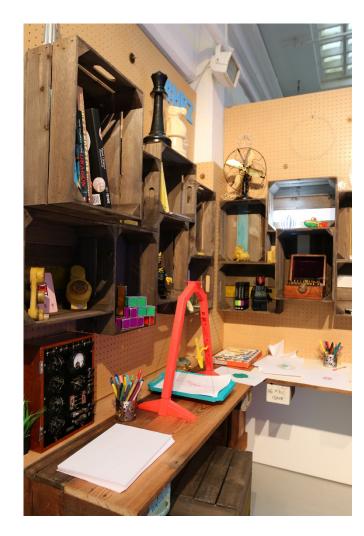
More than 1,150 engineering and manufacturing application professionals work for HP, averaging over a decade of hands-on experience each







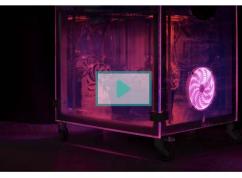
EMEA: Small Spaces Hackathon and Launchbox















MEG is the World's first social and automated greenhouse. Part machine part community. Support MEG and be a home-growing game changer!

We hope to meet with Nature halfway, so we developed MEG, which stands for Micro-Experimental-Growing, MEG is an indoor, open-source, LED based and automated greenhouse, which allows you to precisely control all the key parameters for growing your plants, such as Light-cycles (wavelenghts, intensity, durations). Ventilation, Temperature, Irrigation, Soil PH.

Thanks to a dedicated online platform, to which it is directly connected, you can share or acquire the information about the efficacy of your settings over the plant's



How It Works Login / Sign Up f У 🔤

Gallery



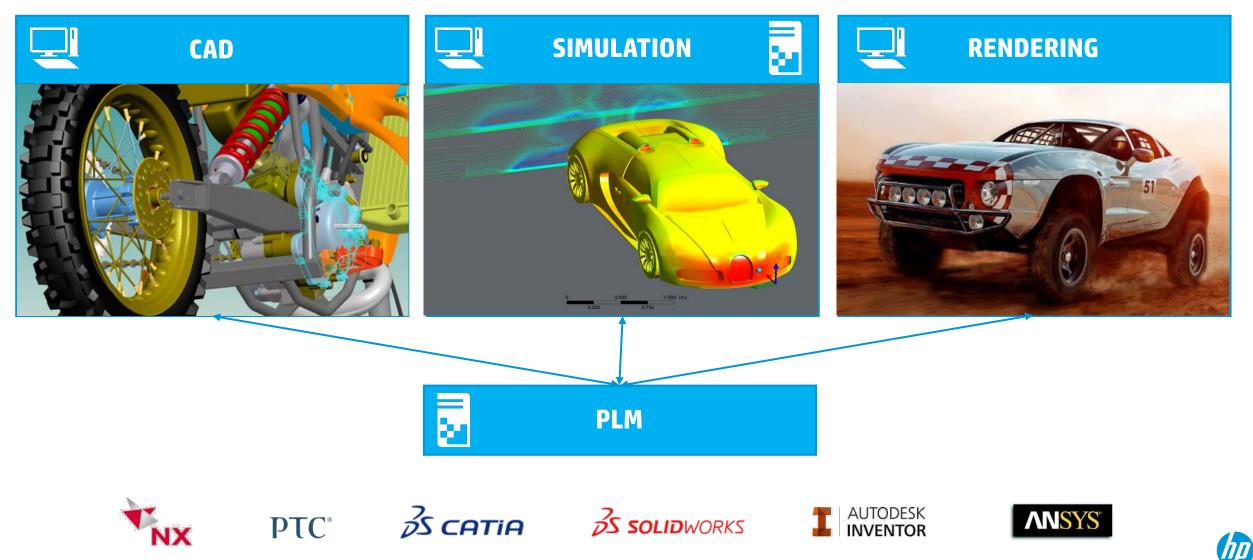
PROJECT CATEGORIES

Consumer Electronics Internet of Things

SHARE THIS PROJECT

f 🏏

Product Development in a nutshell



Dassault Systèmes









Siemens PLM

SIEMENS







PTC

PTC[®]







SOLIDWORKS (Dassault Systèmes)









Autodesk





PLM: PLM 360	Autodesk 360 Cloud
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ANSYS





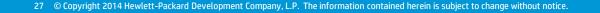
Simulation: MECHANICAL, FLUENT, HFSS...

- Z840, dual processor
- Quadro K6000
- FirePro W7100
- 192GB
- Z Turbo Drive





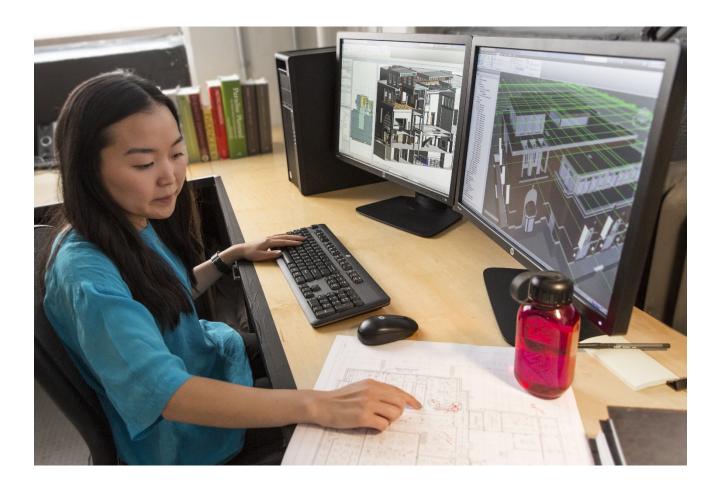
AEC segment





HP in AEC

Huge accounts you never heard of



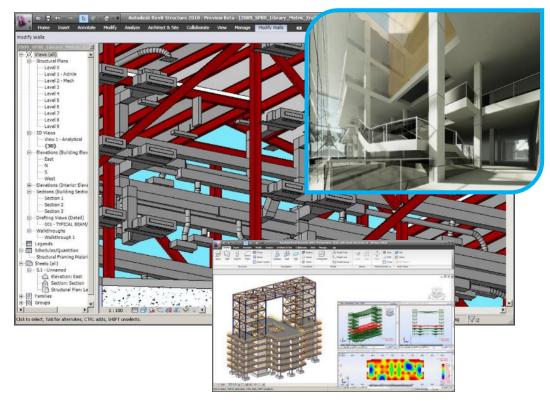






BIM: Building Information Modeling

Parametric Models/Data (BIM)



75% 50% 25% 0% 2007 2009 2012

<u>Source</u>: McGraw Hill 2012 Business Value of BIM in North America SmartMarket Report, published at:

http://images.autodesk.com/adsk/files/mhc_business_value_of_bim_in_north_a merica_2007-2012_smr.pdf

BIM Adoption

The transition of CAD to BIM

CAD (yesterday)





BIM (today) - Buildings





BIM (today) - Infrastructure







AEC in a nutshell

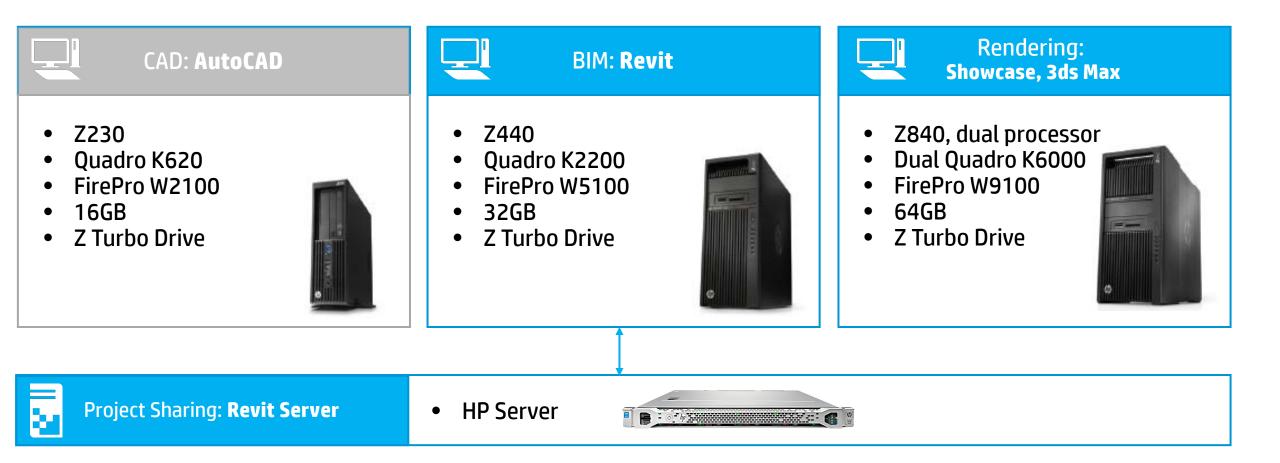






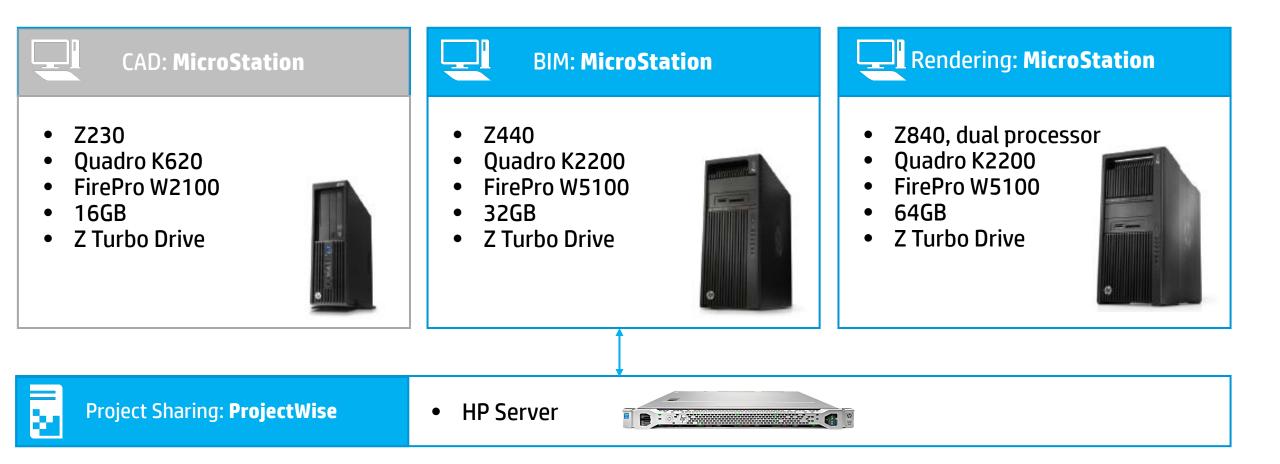
Autodesk





Bentley





Vectorworks

Vectorworks.

CAD/BIM: Vectorworks

- Z230
- Quadro K620
- 16GB
- Z Turbo Drive





Product Development FY15 plans

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R

Autodesk Product Design Suite

Learn why Lynn Allen recommends HP Z Workstations and NVIDIA





MOLDE



Morgan motors Customer video

Lynn Allen and Rex Sellentine Tutorial video series (4 videos)



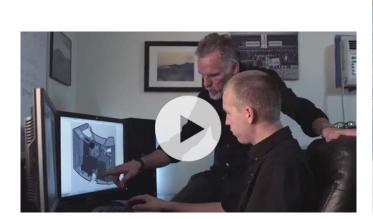
DEVELOP3D Graphics optimization guide



SolidWorks

Tune SOLIDWORKS for performance with HP Z Workstations and NVIDIA







Sage Cheshire Aerospace Customer video Rex Sellentine Tutorial video series (4 videos) DEVELOP3D Graphics optimization guide



AEC FY15 plans



www.hp.com/go/**bim**

BIM Campaign



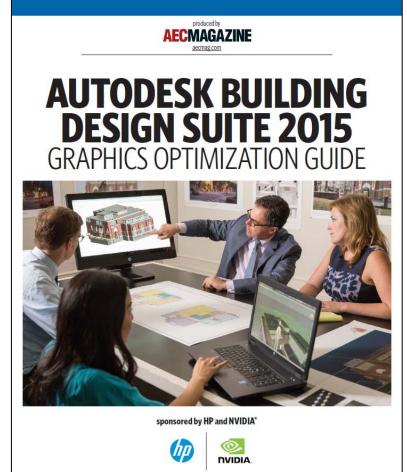
Lynn Allen video



RAMSA video and written testimonial



Autodesk demo video



hp.com/go/BIM | nvidia.com/autodesk

Autodesk optimization guide



THE BUSINESS CASE FOR VIRTUALIZATION

be brought on-line quickly, regardless

Revit*-ready, high-end workstations

of geography or the availability of local.

Running Revit® on a virtual desktop is big news, but what are the key benefits to AEC firms?

Irtualization is one of the hottest rougies in the world of BIM. Move the workstation to the data center and access its full power from anywhere, on any device. It's a compelling message for an industry that's extremely mobile but the benefits go farbeyond simply running Revit'e no virtualized environment, from the perspective of the BIM manaret.

WORKFLOW & COLLABORATION: This is one of the most compelling arguments for Revit* virtualization, and there are several examples. As all data is kept in the data center, next to the virtual workstation, there's no need to transfer complex BIM models across the LAN or WAN from server to desktop. "A 1GB Revit" file might take 1.5mins to open in a data center, but on a traditional workstation [where data is copied from the Revit* server] it could take 20mins," says Adam Jull, CEO of IMSCAD, a global specialist in Revit* virtualization "Virtualization brings with it a big shift in the time taken to open and close files." The challenges of version control can be virtually eliminated as only pixel data is streamed to the endpoint. No BIM data leaves the controlled environment.

of the hottest Collaboration with regional offices or of BIM. Moven third parties can also be seamless with he data center no need to sprichronize huge data files. were from Structural, MEP or general contractors can allwork from the same data center, though attribution of software and hardware costs needs to be considered in this case.

IT MANAGENENT: Management of machines is a major benefit of virtualization. IT administrators don't have to worry about maintaining individual workstations, so for firms with multiple offices. Service packs, fixes and upgrades can all be carried

out in one place - inside the data center. "If you want a new computer you just DATA SECURITY: IP security is another key whip one up," says New York-based BIM driver for AEC firms. As BIM data never consultancy, CASE, "If one gets screwed un leaves the data center, only encrypted you just hit a button and it's fixed." pixels, it's a great way of ensuring sensitive data doesn't fall into the wrong hands. Virtualization also offers complete flexibility in terms of users, making the most "This is not necessarily being driven by out of valuable hardware resources. Virtual architectural firms, but the clients who workstations can be spawned on demand, could be owners of government buildings tailored to the needs of individuals. A part or banks," says IMSCAD's Adam Jull. time Revit* user can get access as and when "Clients are becoming much more aware o required, rather than having a powerful the benefits of virtualization and certainly workstation sat idle under his or her desk. understand the risks of memory stick New teams or contract staff can also culture - the laptop that's lost on the train

> security on contracts — that no dispersed data should be used on a project." <u>hp.com/go/autodeskbulding</u> | <u>nvidia.com/autodesk</u> 1

As a result, a lot of firms are now stipulating

WORK ANYWHERE: Work is a not a place, it's

a thing you do, so goes the virtualization mantra. Users are not restricted to the

design office. An architect can connect to the same high-performance Revit*

workstation from pretty much anywhere:

from home, at a client's office, in the field,

even in a different country. All that's

Autodesk virtualization guide



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www.hp.com/go/autocad

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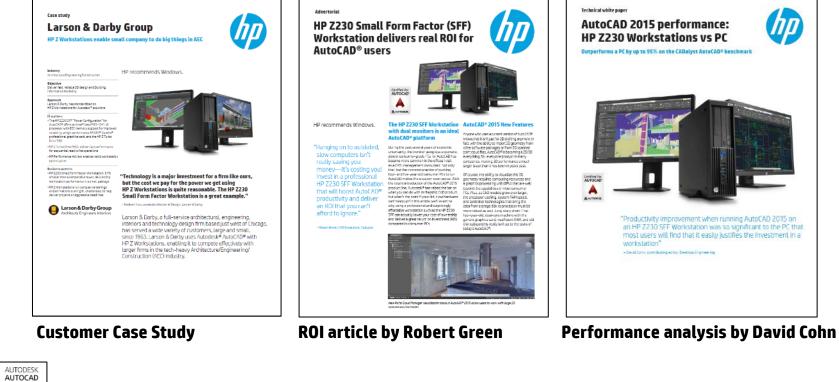
AutoCAD Campaign



Lynn Allen video

ROI calculator

alyze the return on investment (ROI) of a new	workstation over a th	ree-year period.	
AutoCAD Operator Rate 😧 (S/hr)	\$40		
IT/CAD Manager Rate (S(fir)	540		
Cost of New HP 2230 SFF Workstation plus	Peripherals \$1250		
CAD Time Secret 🥥	Hrs/week	Annual Santage	3 Year Savings
Oue to speedier workflows	ž	\$3,840.00	\$11,520.00
Due to reduced crashing/downtime	1	\$3,040.10	\$11,520.00
IT Time Served 😶	Hes/year	Annual Sarlags	3 Tear Savings
Locating/updating drivers	2	\$100.00	\$300.00
Costs Sevel via 3 Year Warranty 🥥	2 Tear Casts		
Average PC 3 year repair costs - parts	\$300.00		
Average PC 3 year repair - labor	\$300.00		
		Total 3 Year Savings	\$23,940.00
Reason event Category			NDL / Payback Rate
3 Year Total RDI 📀	1910%		
Annual ROI	637%		





Product tour



www.hp.com/go/autocad

AutoCAD Campaign

Print ad



E-mail



Landing page with ROI calculator















Nata Treation

Banner Ad



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Trends



Key trends in Product Development



Wrap up

hD

Recap

- 11 million potential workstation users in AEC and Product Development
- Of those, 6 million are currently using PCs (PC Upsell)
- HP is the leader in "Engineering" according to IDC (AEC and Product Development)
- HP Z Workstations are used by the majority of the world's largest automotive brands
- HP Z Workstations are used to build the biggest construction projects in the world
- FY15 PC Upsell Campaigns will help you build incremental business



Sean Young syoung@hp.com

More info: csverticalsegments.com



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