
The Connectivity Platform

Product & Sales Demo Day – 17 December 2019
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Overview: Diverse Go-To-Market Approach Driving Exceptional Performance

Inside Sales: Highly Educated Global Sales Teams Using Cutting Edge Data To Drive Enormous Productivity

Enterprise Sales: Leveraging TeamViewer’s Strengths To Expand And Win In New Segment

Channel Sales: Enabling Further Market Penetration Via Indirect Channels
Diversified Strategy To Enable Broad Customer Reach

**INSIDE SALES**
- Very productive, high velocity model
- Highly educated and incentivised salesforce
- Data-driven approach, leveraging vast customer base

**ENTERPRISE SALES**
- Named account model
- Strong existing foundation to drive growth
  - Large number of Enterprise customers
  - Strength of brand
  - Strong Enterprise product

**CHANNEL SALES**
- Channel strategy broadening reach
  - Distributor/Reseller for local expertise and breadth
  - System Integrators to target solutions for upper mid-market and Enterprise customers

#132 FTEs
#53 FTEs
#30 FTES

Source: Company information, Sales FTEs as of October 2019
Focused Sales Strategy To Win In Different Markets

Source: Company information
1. Sales FTEs added in APAC between December 2018 and May 2019
Inside Sales Team – Highly Productive, Educated And Engaged

✓ Highly productive
  • Complete product suite from TeamViewer Core to IoT
  • Focus on retention
  • Leveraging freed-up resources following the SaaS transition to drive growth

✓ Highly educated
  • >70% university educated
  • Frequent live coaching and skill trainings

✓ Engaged
  • Pipeline ownership
  • Relationship building through sales cycle

✓ Diverse
  • 35 nationalities speaking over 25 languages
  • More than one third of workforce female

✓ Performance focused
  • Individual targets and daily tracking
  • Frequent reviews and 1:1s
  • ~25% variable pay
Leveraging Our Strengths To Win In Enterprise

Strong Enterprise Sales Organisation Poised For Future Growth

>50%

Of Fortune 500 companies already TeamViewer customers (1)

+60%

Year-on-year growth in large contracts (2)

Strong Existing Foundation

✓ Well-known, trusted brand
✓ Existing customer base for basic product providing huge up-sell and cross-sell opportunity
✓ Strong integration and good relationships with leading platforms

Leading Product

✓ New products with enterprise-grade features
✓ Native cloud technology providing pricing advantage
✓ Enterprise use cases to further drive growth

Leading Team

✓ Experienced and focused enterprise account executives
✓ Close to customers through local on-the-ground presence
✓ In-market and vertical expertise
✓ Industry events to educate and network with other leading companies

Source: Company information
1. Companies which have had at least one invoice with TeamViewer as of June 2019
2. Growth of number of customers with annual contract value above €10k (any product) Year-over-year Q3 19 vs. Q3 18
## Strong Partnerships Delivering Low Cost Penetration

### Partnership Structure

<table>
<thead>
<tr>
<th>Region</th>
<th>Partnerships</th>
</tr>
</thead>
<tbody>
<tr>
<td>EMEA</td>
<td>Distributors (e.g. Ingram, Prianto, Lifeboat, Pax8, Ingram, Synnex)</td>
</tr>
<tr>
<td>AMERICAS</td>
<td>Resellers &amp; System Integrators (e.g. Atea, Bechtle, Software One, Softline, Insight, LAC, Sinata)</td>
</tr>
<tr>
<td>APAC</td>
<td>+ ~380 registered partners as of June 2019</td>
</tr>
<tr>
<td></td>
<td>+ ~1,100 registered partners as of June 2019</td>
</tr>
<tr>
<td></td>
<td>+ ~830 registered partners as of June 2019</td>
</tr>
</tbody>
</table>

- **Two-tier model** in all geographic markets
- **Leveraging distributors** for local expertise and breadth
- **Leveraging System Integrators** for solutions building and upper mid-market & enterprise access
- **Roll-out of Channel program 2.0** to enhance focus on value business

Source: Company information

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**Channel Sales**

**Insights in Sales**

9
TeamViewer Salesforce With Highly Effective Set-Up To Enable Further Growth

1. **Overview**
   Diversified Go-to-market approach driving exceptional performance

2. **Inside Sales**
   Highly productive Inside Sales organisation underpinned by data-driven approach

3. **Enterprise Sales**
   New and dedicated Enterprise Sales team with substantial growth potential

4. **Channel Sales**
   Further market penetration at high end via indirect Channel Sales

**Insights in Sales**
Insights in Enterprise
Leveraging 1 Cloud Remote Connectivity Platform to Solve 100+ Business Challenges

Roger Illing, Executive Vice President Enterprise
Remote Connectivity Has Become Business Critical

<table>
<thead>
<tr>
<th>DIGITAL TRANSFORMATION</th>
<th>IOT &amp; AI</th>
<th>FUTURE OF WORK</th>
</tr>
</thead>
<tbody>
<tr>
<td>Digital transformation market size by 2023</td>
<td>Total IoT endpoint hardware spending</td>
<td>Employees globally work outside main office headquarters at least 2.5 days a week</td>
</tr>
<tr>
<td><strong>$665bn</strong></td>
<td><strong>€186bn</strong></td>
<td><strong>&gt;50%</strong></td>
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</table>

<table>
<thead>
<tr>
<th>ROBOTICS &amp; AUTOMATION</th>
<th>DEVICE &amp; APPLICATION PROLIFERATION</th>
<th>CARBON FOOTPRINT REDUCTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Worldwide spending on robotics systems &amp; drones in 2022</td>
<td>Average number of devices and connections per household in North America by 2022</td>
<td>EU’s target to reduce greenhouse gas emissions by 2030 compared to 1990</td>
</tr>
<tr>
<td><strong>$210bn</strong></td>
<td><strong>24</strong></td>
<td><strong>40%</strong></td>
</tr>
</tbody>
</table>

Source: Company information based on third-party market study and publicly available information, Cisco VNI, IDC, IWG, MarketsandMarkets
Digital Transformation Enabling Businesses To Compete More Efficiently And Effectively

What is happening
Global digital transformation spend
€665 Bn by 2023

Why TeamViewer
Simplicity in connectivity allowing to interact from anywhere at anytime across devices

How you benefit
- Drawing from remote connectivity and remote collaboration expertise
- Strong focus on security gives confidence to your customers
- Partnering with system integrators to act as a catalyst

Source: Company information based on third-party market study, MarketsandMarkets
Why TeamViewer
Connectivity enables the communication between IoT devices with high returns for customers

How you benefit
- Broad device coverage enables you to leverage this trend
- Easy-to-use and affordable solution with fast installation and mass deployment
- Focus on heterogeneous networks and interoperability

Source: Company information based on third-party market study and publicly available information
Deployment Of Robotics And Automation Beyond Classical Manufacturing

Why TeamViewer
Advanced remote control capabilities enable automation and incident management, reducing need for human presence

How you benefit
- Off-the-shelf functions to automate tasks or processes
- Leverage remote monitoring and control of devices with automated incident management

What is happening
$210 billion
Worldwide spending on robotics systems & drones in 2022

Source: Company information based on third-party market study, IDC
1. Robotic process automation
We Deliver Business Connectivity...

TEAMVIEWER PLATFORM

- Easy-to-Use
  - Deployed across organisation

- Open
  - Device and system agnostic

- Secure
  - End-to-end encryption

- Flexible
  - Travels across use cases

Anywhere

Anyone

Anything

Anytime
... Based On A Modular And Highly Scalable Technology Stack.

- Internal IT Support
- External Customer Support
- Remote Work
- Virtual Reality Support
- IT Management
- IoT / Connecting Devices

**Apps**
- servicenow
- Microsoft Intune
- salesforce
- mobileiron
- Custom Apps
- ...

**Integration into...**

**Connectivity Services**
- TeamViewer
- TeamViewer Internet of Things
- TeamViewer Pilot
- TeamViewer Remote Management
- TeamViewer Remote Access
- blizz

**Security Layer**

**Connectivity Platform**

- Large and Rapid Network (1)
- >1,000 routers
- 100% Cloud Massively scalable infrastructure
- Zero knowledge-based principle
- High Security Standard Two-factor authentication and end-to-end encryption
- Reliable ~99.9% uptime (2)
- Low Latency Strong connection across high and low bandwidth

Source: Company information Referring to remote connection networks June 2019 YTD
Creating Significant Value For Your Organization

Cost Savings Driving ROI

“30% reduction in case resolution time for in-field service workers”

“Time required for remote authentication decreased from 15 minutes to 10 seconds”

“Without TeamViewer, we would need about 10-15 agents to be on call and ready”

“ Registers […] cannot store data long-term. TeamViewer simplified register retrieval and product evaluation management.”

“ If climate control fails, we could have 40k dead chickens within one hour […] Without TeamViewer, we would have to be on site.”

New Business Models Helping Revenues Grow

“20% capacity increase for remote support team vs. competitor solutions”

“It saves us $30k in travel expenses per year”

“It literally saves us thousands of man hours a year travelling all over the country.”

“Increasing […] income by 20% with the cattle behavioural mating recognition system […] TeamViewer allows breeders to check [their cattle]”

“Actually, TeamViewer is the reason why we started this [IT management] business in the first place.”

Source: Company information, Nucleus
Powering A Global IT Helpdesk

IT support solution for an Austrian hardware manufacturer with a global footprint

MACO Employee

TeamViewer

MACO IT Helpdesk

"We are very happy with TeamViewer. The software lets us handle support cases efficiently"

"Unlike before, we now enjoy stable connections every time, which has allowed us to cut the support cost by 20 percent"

"With TeamViewer, we feel well-equipped to handle further growth, including on the IT support side"

Source: Company information
Centralising Digital Signage Management

**TeamViewer Solution**
- Single platform for Philips clients to manage their professional signage screens worldwide
- Pre-installed on many screens by default

**Customer Situation**
- Philips needs solution for its customers to access commercial screens
- Screens used for wide array of applications

**Challenge**
- Signage screens distributed worldwide, partially in limited bandwidth locations
- 24/7 access needs to be ensured in all locations

“**We have embedded [...] TeamViewer in all our signage screens**”
“**You have total control of what is happening [on the screen] everywhere in the network globally.**”
“**We can change picture content anywhere across the globe**”

Source: Company information
### Enabling Smart Agriculture & Farming

**Revolutionising agriculture through monitoring, control, and technical support**

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#### TeamViewer Solution
- Pre-installed on Trimble devices for remote fleet management and monitoring from factory
- Broad remote management capabilities for farmers

#### Customer Situation
- Agricultural equipment geographically dispersed, oftentimes in remote regions
- Functioning equipment is business critical

#### Challenge
- Smart farming equipment increasingly complex requiring frequent technical support
- Increasing data intensity of smart farming methods

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**“We were really ecstatic when we found out that Trimble had partnered with TV [...] We were just able to log in remotely”**

**“With TeamViewer customers did not have to explain what they are seeing [on their equipment]”**

**“He logged in from Ottawa which is a 1.5 hour drive away and fixed [the connectivity issue]”**

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Source: Company information
Powering Remote Physical Therapy

MediTouch offers patients secure at home physical therapy sessions with TeamViewer.

<table>
<thead>
<tr>
<th>TeamViewer Solution</th>
<th>Customer Situation</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Tele-rehabilitation solution allowing therapist to see and interact with / give feedback to patient</td>
<td>• MediTouch requires interact solution to make disruptive tele-rehabilitation possible</td>
</tr>
<tr>
<td>• Monitoring of specialised therapy devices</td>
<td>• Rehab devices create data and need to be monitored</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Challenge</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Patients with different operating systems / devices at home dispersed across country</td>
</tr>
<tr>
<td>• Highest security requirements given data sensitivity</td>
</tr>
</tbody>
</table>

“We needed to be able to see the patients and adjust the rehabilitation in real time”

“After we did a trial with TeamViewer we realised it fits our exact needs”

Source: Company information
You can connect (nearly) everything.