

The logo for Seeking Alpha, with the text 'Seeking Alpha' in white and a gold Greek letter alpha symbol to the right, all on a dark red background.

Datawatch: The Wall Street Analyst Forum Presentation Transcript

Question-and-Answer Session

Unidentified Audience Member

(Question Inaudible)

Ken Bero

Well, it depends on kind of where we are selling. We will sometimes run into business objects and covenants, quite frankly on the Content Management side there really isn't a competitor and we've got the Content Management folks that are taking us into their sites and being participants with us. Really, quite frankly, there are not many folks in the market space who do what we do, and we have lots of conversations with the organization. We compete with ourselves and so it's a matter of talking to as many people as we can possibly talk to and getting the solutions set out in front of the customers.

Unidentified Audience Member

There's a lot of folks in content management much of what I understand, how you really differ except that you got the integrated business intelligence?

Ken Bero

Well, I think that's our differentiation. We would not -- I won't stand here and say that we are going to go out and displace IBM and a CMOD implementation or Hyland are or Documentum or any of the other folks that exist out there from an archive perspective. We do, on occasion, want to cross new implementations where we have a solution standalone that we can go sale. We are certainly servicing our own customer base around the BDS product which is about a 150 strong across the world.

The key about solutions are that they are enablers. And when you take it from that context, we will make solutions that you got currently install better and that will make them more effective and not ask you to reinvent the wheel. We are not asking you to take the investment that you have made, move it out and displace it. We are an enabler to enhance your current investments and make them better than what they are.

Unidentified Audience Member

Are you selling software that services the pure licensing model?

Ken Bero

Fundamentally, it's perpetual licenses. We do have a subscription service that accounts for something in the neighborhood of 1 plus in 10% of revenue at the enterprise level and that's really kind of the distinction that some folks has opposed to doing the capital acquisition would rather do it from an operating perspective and not of operating budget. So it's more of a financing issue than it is anything else. We have really not seen much of demand from an ASP perspective for example. So, it's really still selling. People want control of their information and their data, especially the financial folks and then the healthcare folks. They want to keep that in-house.

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