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The bridge to possible

Analyst's take on Full-Stack Observability

Stephen Elliot – Group VP, I&O, IDC
Carlos Pereira – Fellow and Chief Architect

BRKAPP-1014

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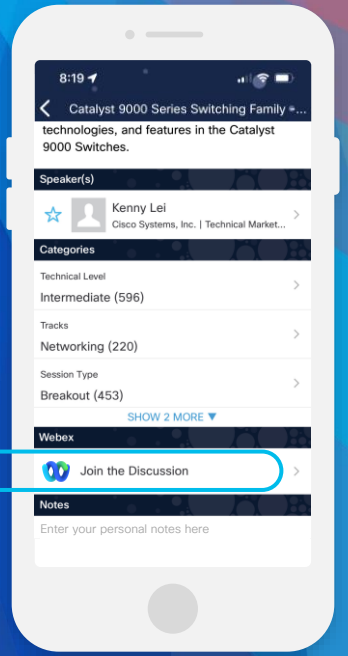


https://ciscolive.ciscoevents.com/ciscolivebot/#BRKAPP-1014

Agenda

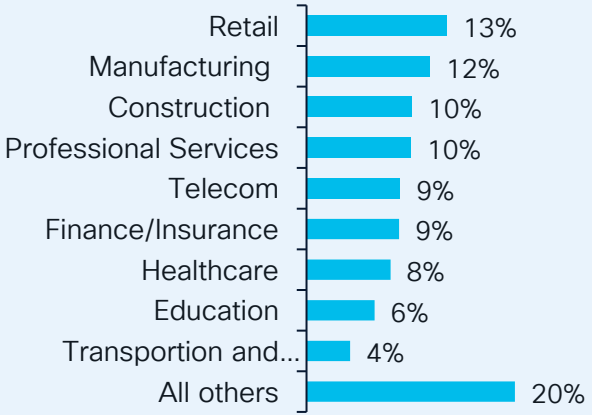
- Full Stack Observability survey
  - Current State
  - Solutions
  - Strategies
- Conclusion

Survey Sample Demographics (n=2,062)

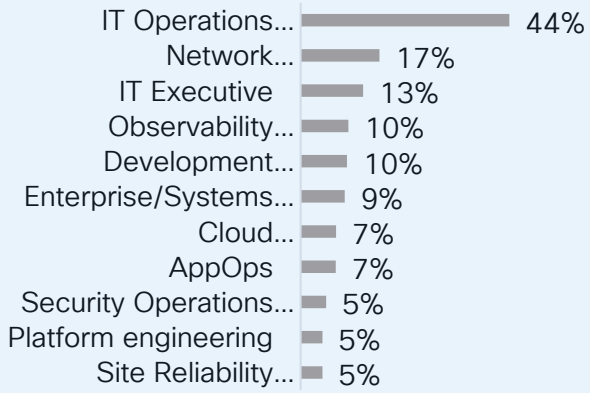
Respondents per Country

US	406
Canada	154
Mexico	105
Brazil	103
United Kingdom	262
France	157
Germany	154
Netherlands	101
India	152
Singapore	160
Japan	153
Australia	155

Primary Industry



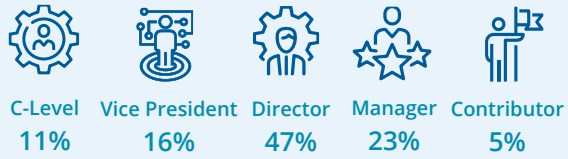
Department



Company Size

Knowledge/Authority

- Have monitoring/observability solutions
- Familiar with monitoring/observability solutions
- Decision maker or influences decisions for monitoring/observability solutions



Executive Summary – top results, in a nutshell

- 40% of the respondents aligned their understanding of observability applied to monitoring as “tools and practices that enable the sharing of intelligence and insights across multiple IT teams”

- 75% said they spend a million or more, and of that 21% spend $5 million or more, with 46% plan to increase their budget over the next two years. 42% plan to stay the same.

- 40% use 2-10 monitoring / observability tools, 28% 11-20 tools, and 18.5% 21-40 tool. 10% use 41-100 tools.

- 74% said data collection and correlation is difficult. 82% said it’s difficult to deliver a flawless digital experience to internal employees and external business partners, 77% said the same for end customers.

Executive Summary – What does it mean ?

- **Observability as a practice** and set of capabilities requires a foundation based on data collection, analysis, and insights that can be shared in context across multiple IT and business teams.

- **Spending is strong**, and almost half of **organizations plan to increase their budget** over the next two years.

- **Tool sprawl is real,** but cost savings is not a top driver

- There’s no material difference when **delivering a flawless digital experience** for employees, partners, or end-customers.

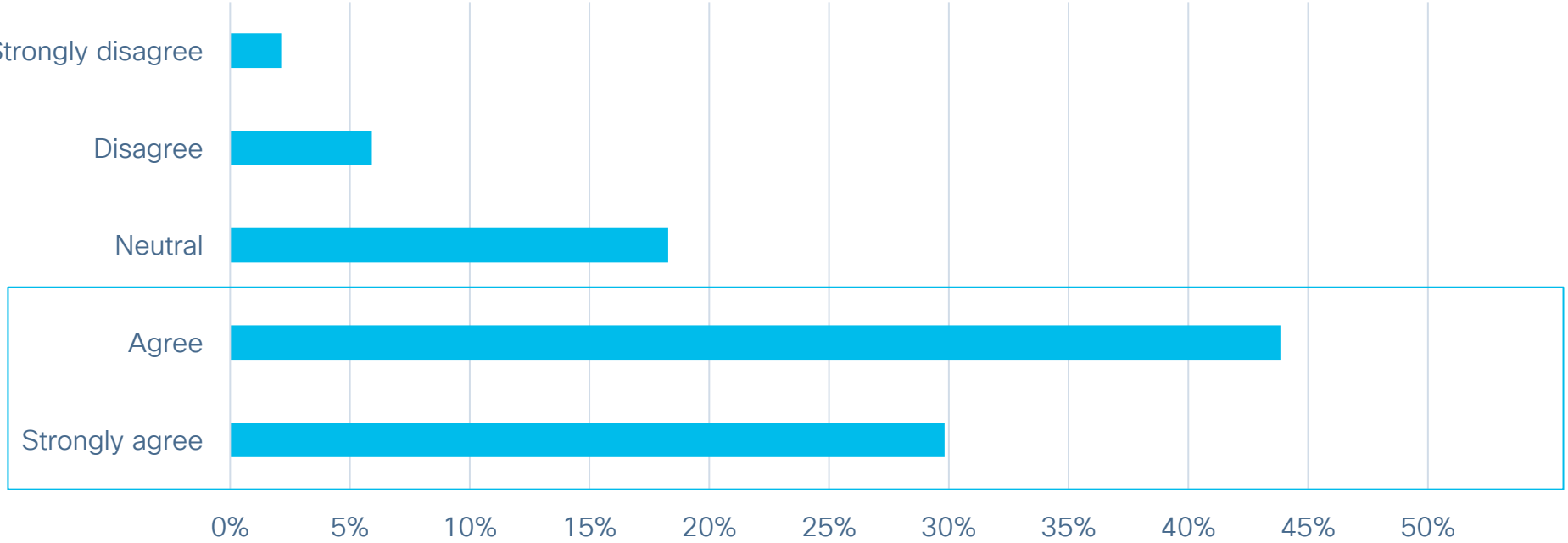
Full Stack Observability Survey: Summary Focal Points

Current State (1/5)

Observability well established as key tactical and strategic function with vital benefits, exec support, rising budgets.

CEO and business leadership support Observability

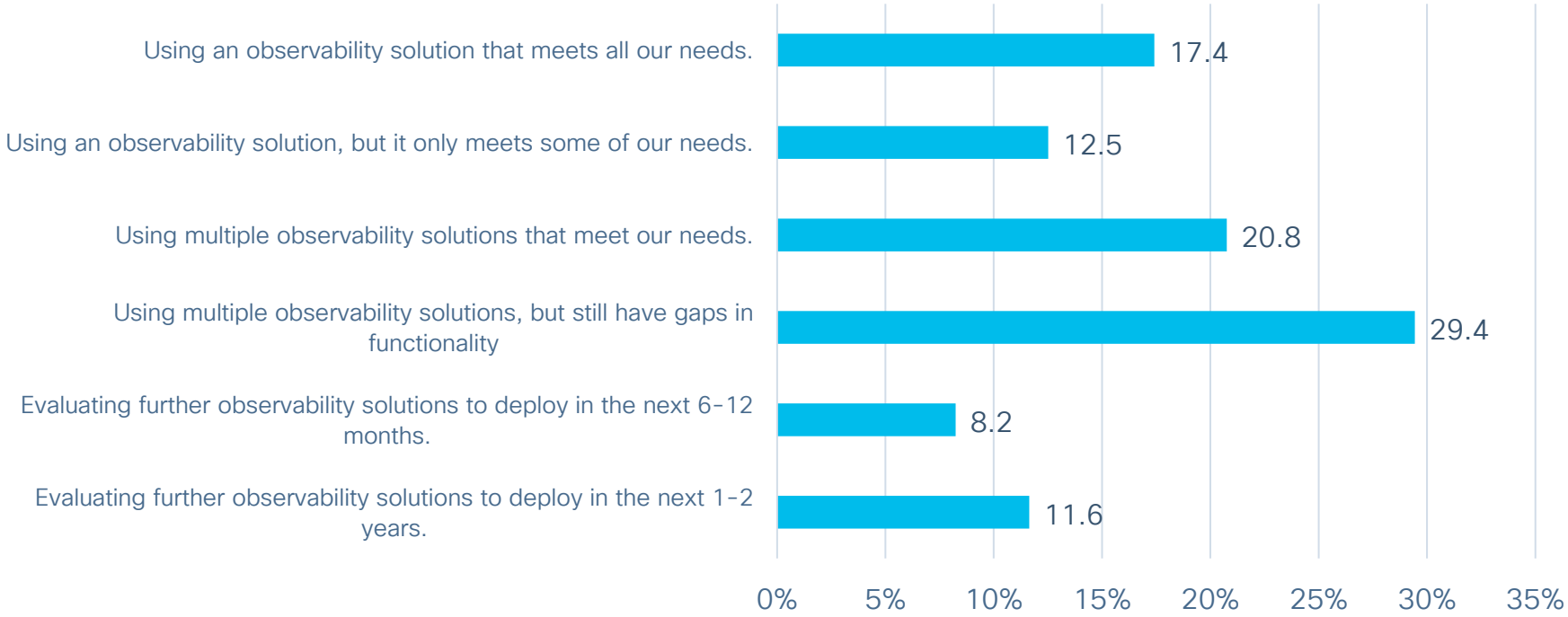
My CEO and business leadership understand that complete visibility and control over infrastructure, network, applications, security, and digital experience is critical to digital business success – Considering your organization's approach to observability across infrastructure, network, applications, cybersecurity, and digital experience management, to what extent do you agree?



n = 2062
Base=All Respondents
Notes: Managed by IDC's Global Primary Research Group.; Data Not Weighted; Use caution when interpreting small sample sizes.
Scale: 1-Strongly disagree 5-Strongly agree
Source: Full Stack Observability Thought Leadership, IDC, March, 2023

62% of organizations Admit to Observability Functionality Gaps

What is the state of observability within your organization?



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Source: Full Stack Observability Thought Leadership, IDC, March, 2023

What is Cisco Full-Stack Observability

Full Stack Observability (FSO) is a requirement for business to deliver the most optimal and secure experience to users and applications.

Cisco Full-Stack Observability brings together data from multiple operations domains and derive real-time insights helping to:

Focus on what matters most: revenue, user experience, risk, costs

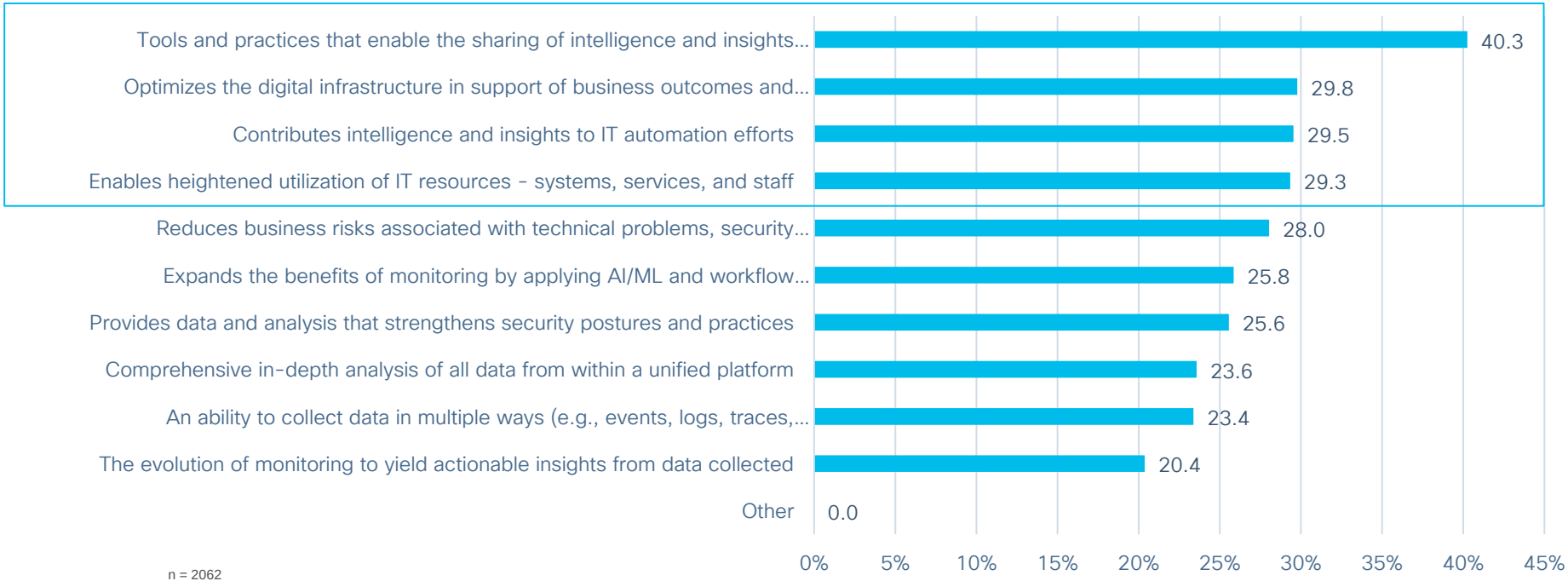
Reduce time to resolution of incidents and performance issues;

Minimize tool sprawl; and

Break down silos by reducing friction among teams, typically infrastructure, security, applications, networking and cloud

IT Unification, Optimization, and Automation Core to Observability

Which of the following best aligns with your understanding of observability applied to monitoring solutions?



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Source: Full Stack Observability Thought Leadership, IDC, March, 2023

Full Stack Observability Survey: Summary Focal Points

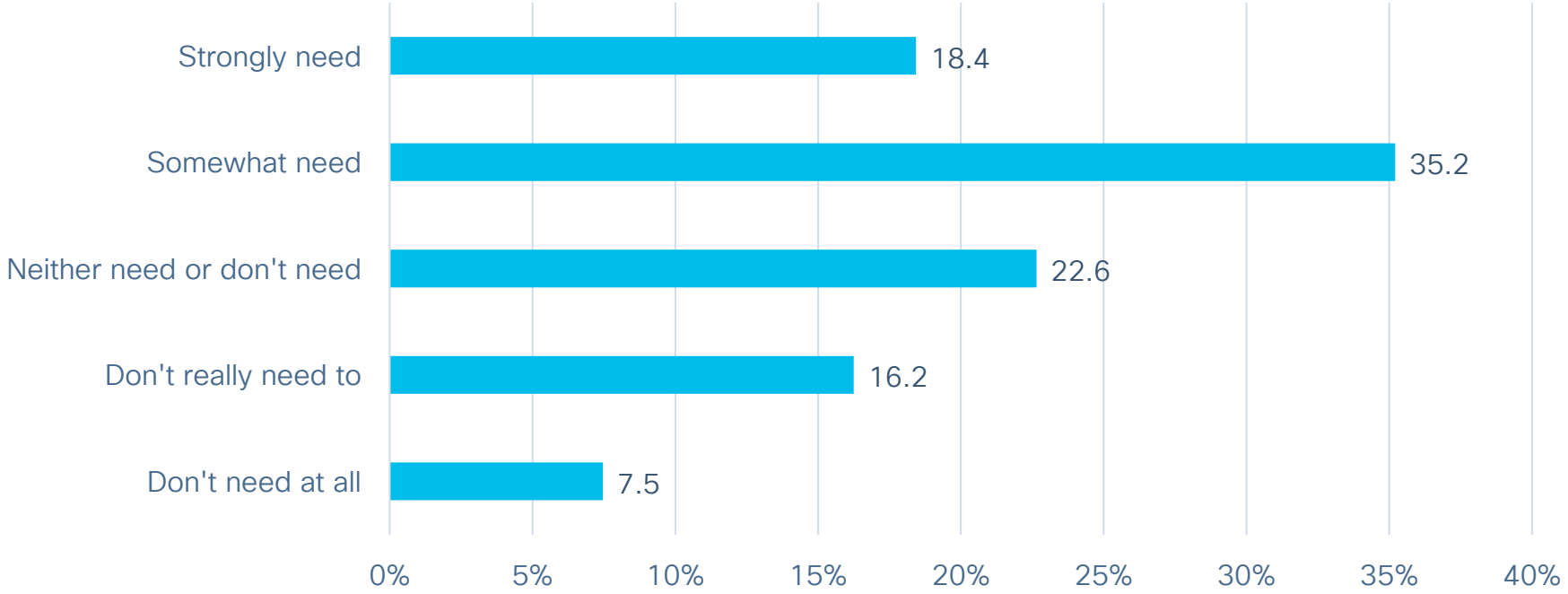
Current State (2/5)

Observability well established as key tactical and strategic function with vital benefits, exec support, rising budgets.

Observability seen as a primary tool in strengthening IT teamwork – with special emphasis on IT/Sec/Cloud Ops.

53% of Organizations Need to Unify Observability Across Teams

How strongly does your organization need to unify observability across critical IT management domains such as infrastructure, network, applications, cybersecurity, and digital experience?



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Base=All Respondents
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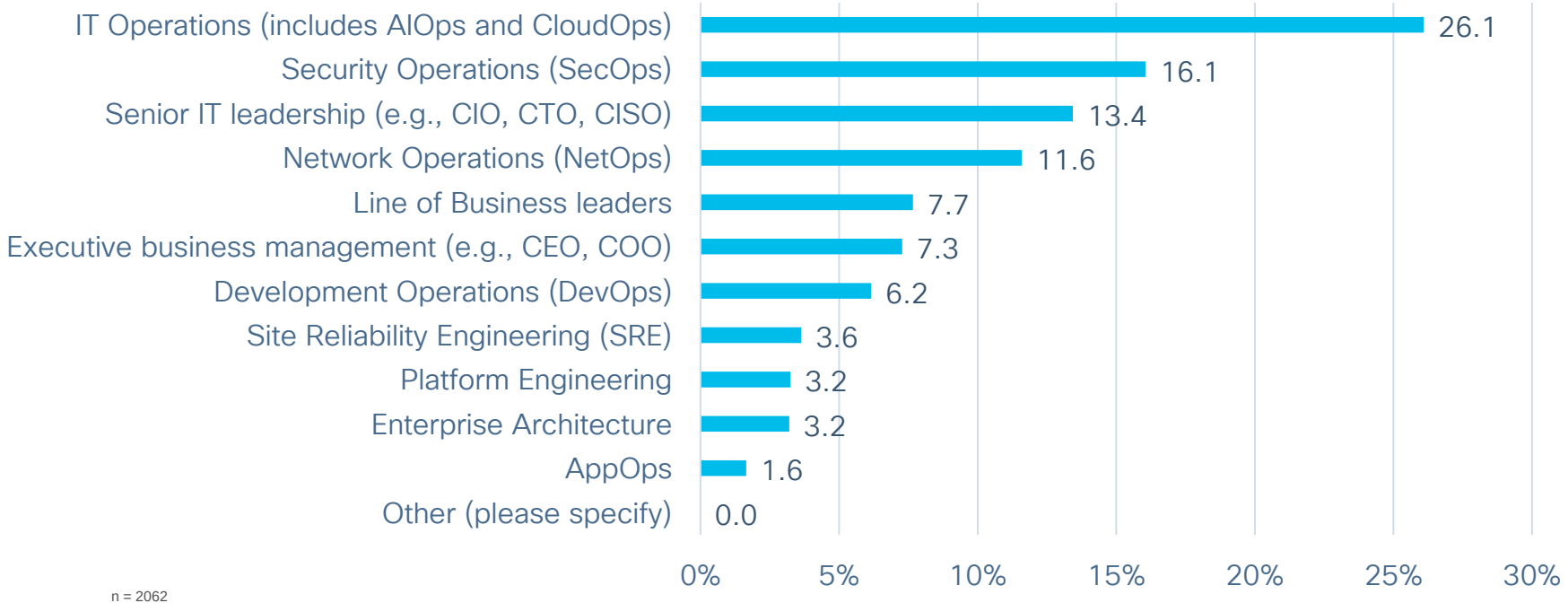
Source: Full Stack Observability Thought Leadership, IDC, March, 2023

IT Ops and SecOps Lead the Way for Observability Leadership, However Senior IT and Business Leaders Are Involved

Who should be responsible for establishing, controlling, and advancing observability efforts within your organization?



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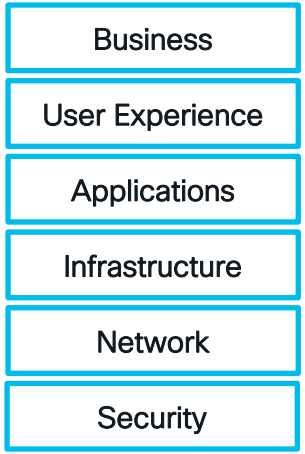
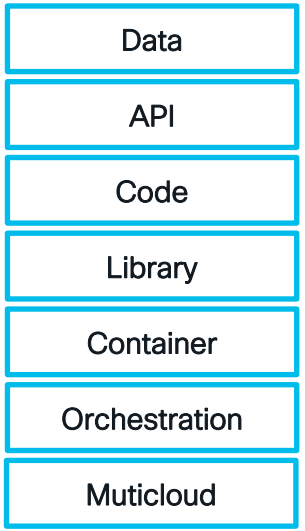
What one may consider as ”full-stack” ?

The teams / persona perspective

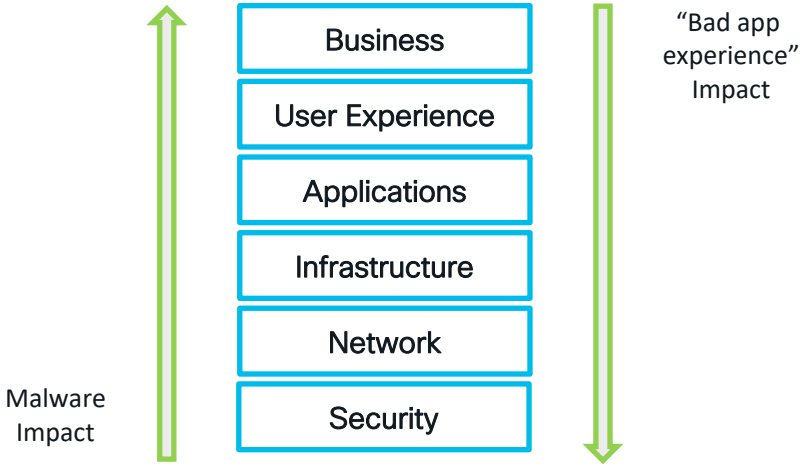


The application / dev / technology perspective



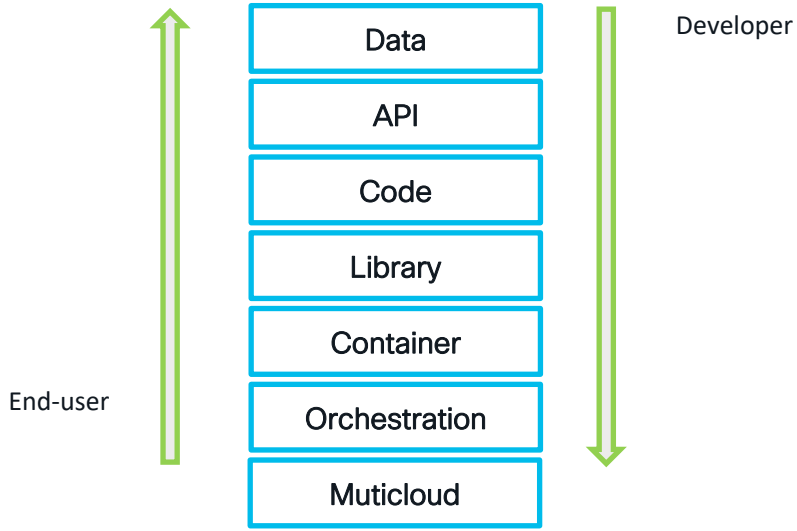
The “full-stack dichotomy”

The teams / persona perspective



“Full-stack” anchored on people,
Impact driven by technology

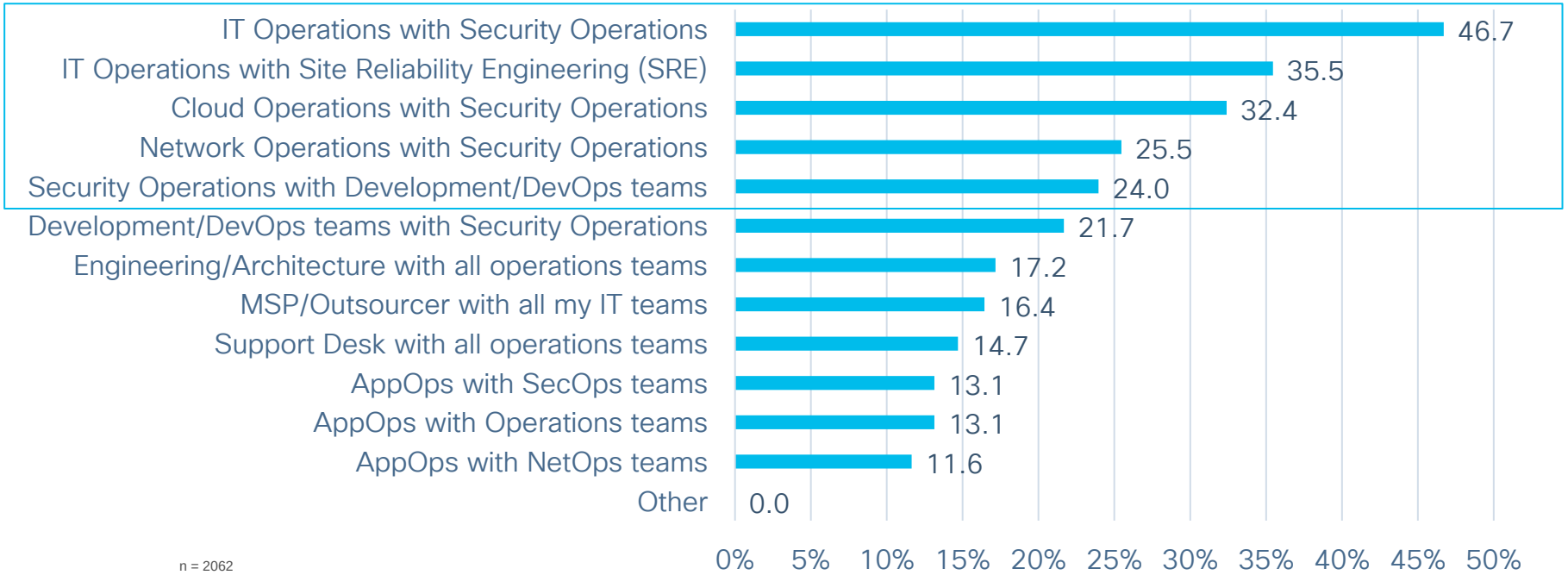
The application / dev / technology perspective



“Full-stack” anchored on technology,
Impact is driven by people

Increasing Collaboration with SecOps is a Key Value Proposition

Which combination of teams do you expect to improve their collaboration by using observability capabilities?



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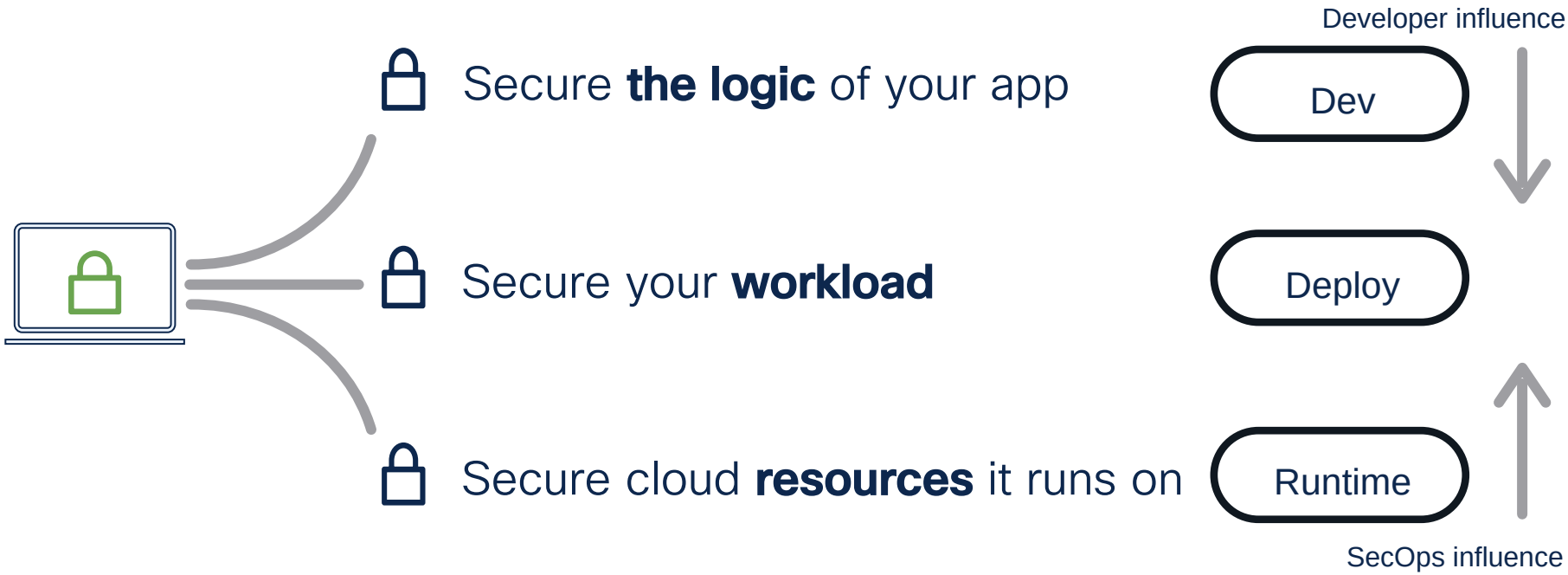
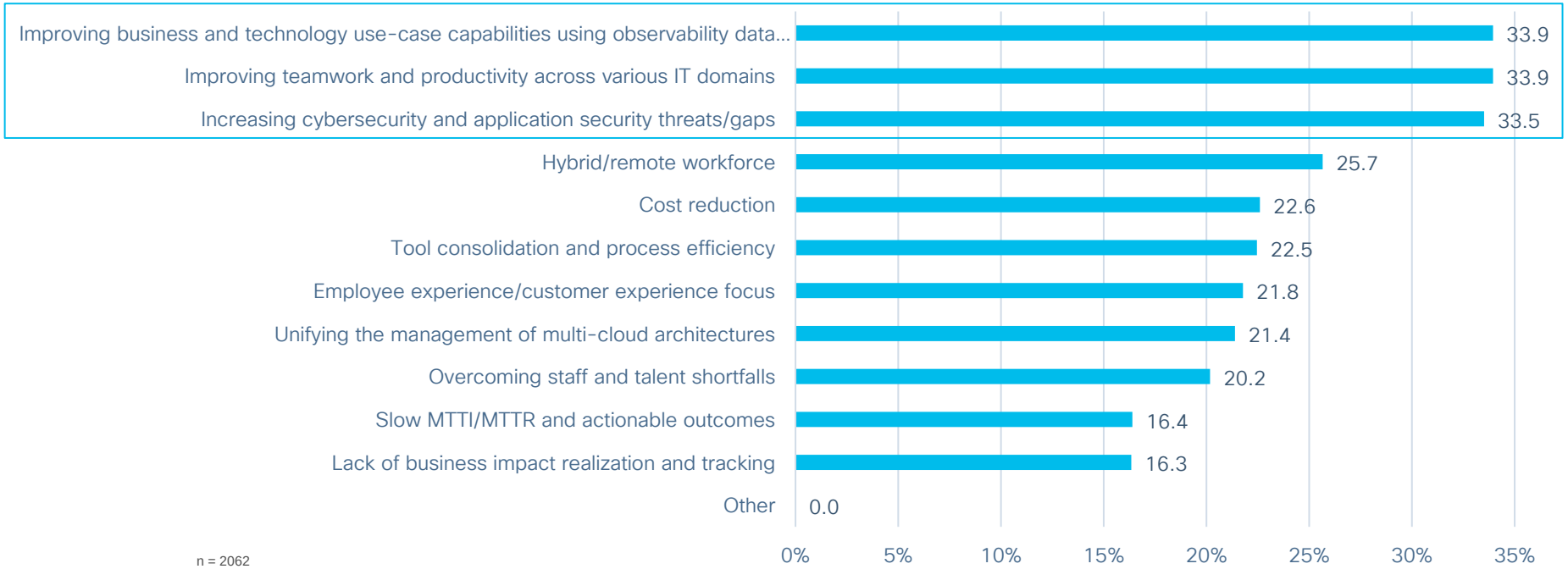
Source: Full Stack Observability Thought Leadership, IDC, March, 2023

Application Security and Observability convergence



Cost Reduction is not Necessarily a Driver to Unify Observability Across IT Teams

What is driving the need to unify observability across critical IT management domains such as infrastructure, network, applications, cybersecurity, and digital experience?



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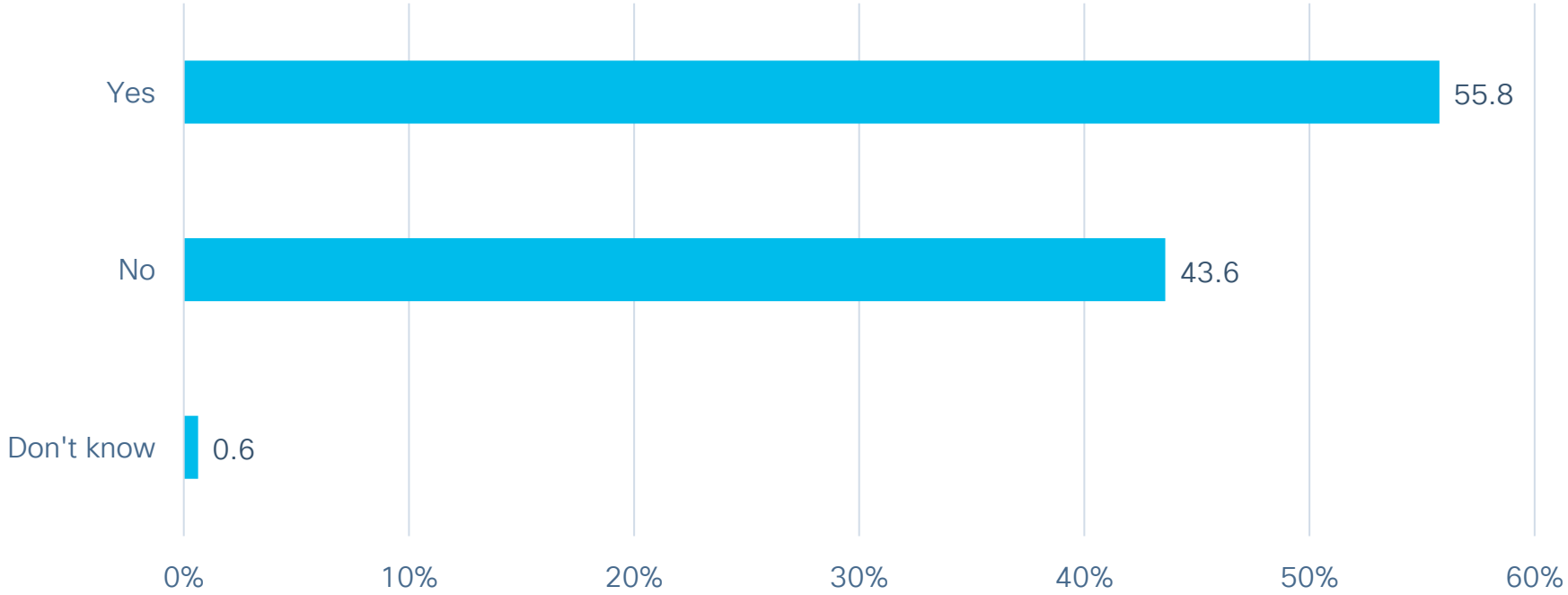
Source: Full Stack Observability Thought Leadership, IDC, March, 2023

56% of Organizations Have a Platform Engineering Team

Is your organization creating a platform engineering team to empower cross-IT team collaboration and/or solution/architecture/management standards?



n = 2062
Base=All Respondents
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Source: Full Stack Observability Thought Leadership, IDC, March, 2023

Full Stack Observability Survey: Summary Focal Points

Current State (3/5)

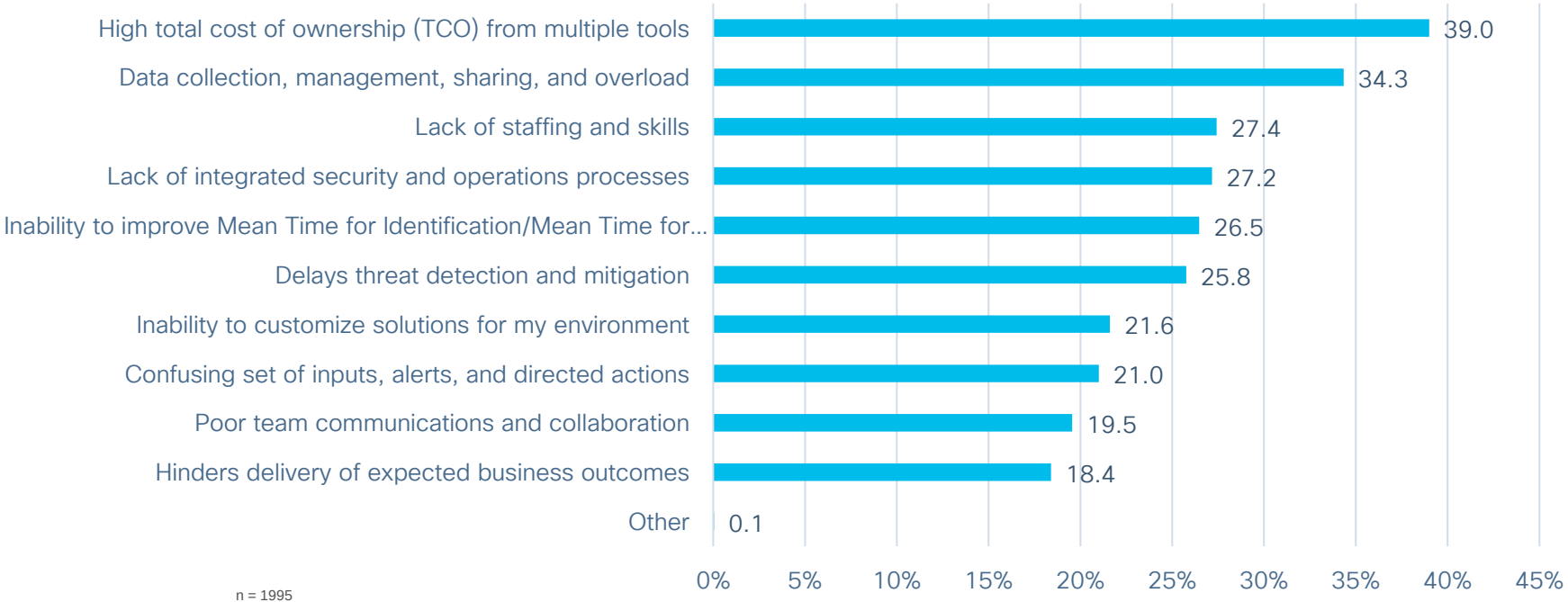
Observability well established as key tactical and strategic function with vital benefits, exec support, rising budgets.

Observability seen as a primary tool in strengthening IT teamwork – with special emphasis on IT/Sec/Cloud Ops.

IT uses an abundance of observability tools… and management gaps persist.

Using Multiple Tools Creates Many Challenges, Leading with a High TCO

What are the biggest challenges of utilizing multiple monitoring/observability tools for managing infrastructure, network, applications, cybersecurity, and digital experience?



n = 1995

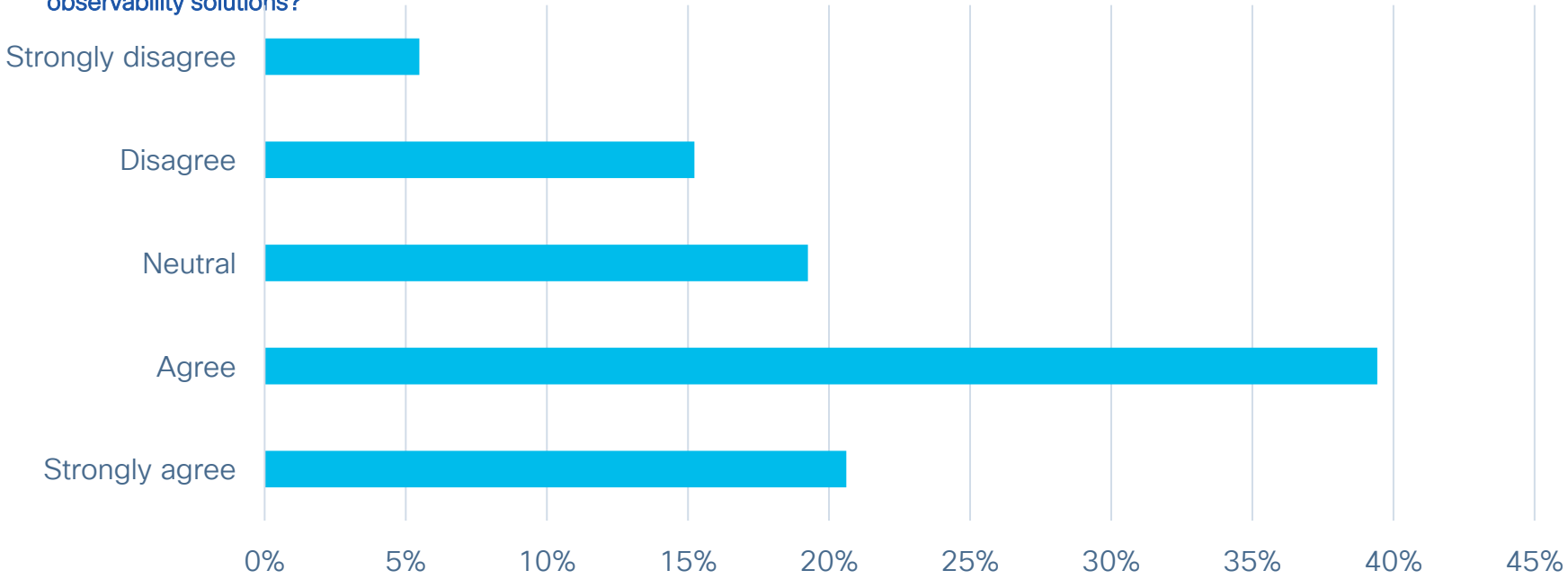
Base=Respondents indicated their organization apply to infrastructure, network, applications, cybersecurity, and digital experience

Notes: Managed by IDC's Global Primary Research Group.; Data Not Weighted; Multiple dichotomous table - total will not sum to 100%; Use caution when interpreting small sample sizes.

Source: Full Stack Observability Thought Leadership, IDC, March, 2023

60% said They Agree that Most Observability Tools Serve Narrow Requirements and Fail to enable a Complete Operating View

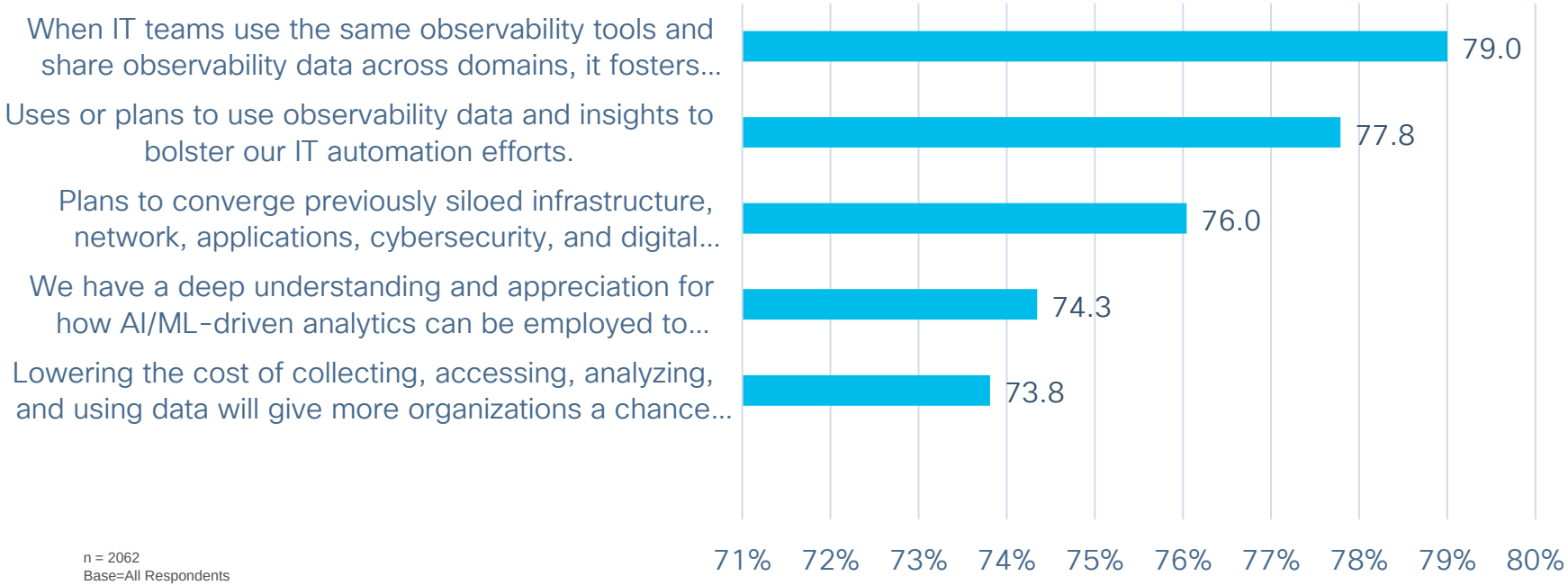
Most observability tools serve narrow requirements and fail to enable a complete view into current and trending operating conditions - In examining observability solutions adopted or to be adopted within your organization, to what extent do you agree with each of the following statements about observability solutions?



n = 2062
Base=All Respondents
Notes: Managed by IDC's Global Primary Research Group.; Data Not Weighted; Use caution when interpreting small sample sizes.
Scale: 1-Strongly disagree 5-Strongly agree
Source: Full Stack Observability Thought Leadership, IDC, March, 2023

Team Collaboration, Automation, and Tool Convergence Are Leading Interests for Observability Adoption

In examining observability solutions adopted or to be adopted within your organization, to what extent do you agree with each of the following statements about observability practices?



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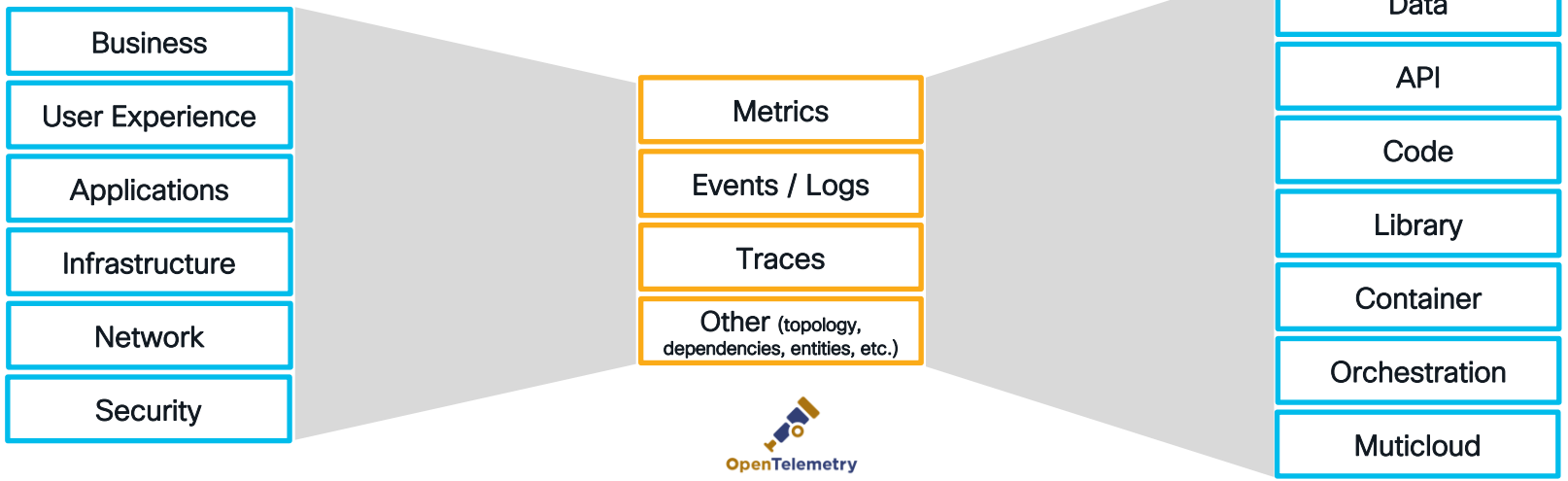
Base=All Respondents
Notes: Managed by IDC's Global Primary Research Group.; Data Not Weighted; Use caution when interpreting small sample sizes.
Scale: 1-Strongly disagree 5-Strongly agree
Source: Full Stack Observability Thought Leadership, IDC, March, 2023

What is required to enable “full-stack observability” ?

The “teams / persona” stack + The “telemetry data” stack + The “application stack”



M.E.L.T = Metrics, Events, Logs, Traces

Full Stack Observability Survey: Summary Focal Points

Current State (4/5)

Observability well established as key tactical and strategic function with vital benefits, exec support, rising budgets.

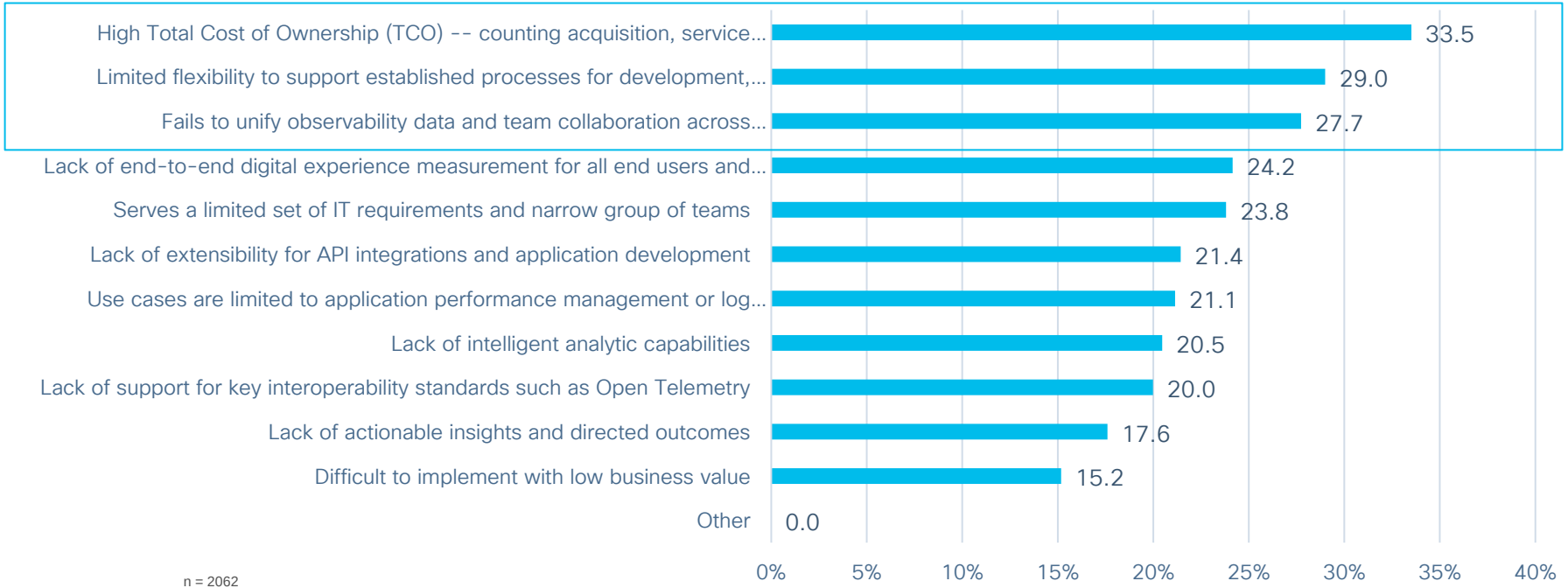
Observability seen as a primary tool in strengthening IT teamwork – with special emphasis on IT/Sec/Cloud Ops.

IT uses an abundance of observability tools… and management gaps persist.

Significant problems: High TCO, Data access/use, IT productivity, Delayed resolution/mitigation efforts, limited flexibility, narrow use cases…

Three Areas of Limitations Stand Out: High Costs, Process Support, and Data Unification and Team Access

What are the limitations of current observability solutions?



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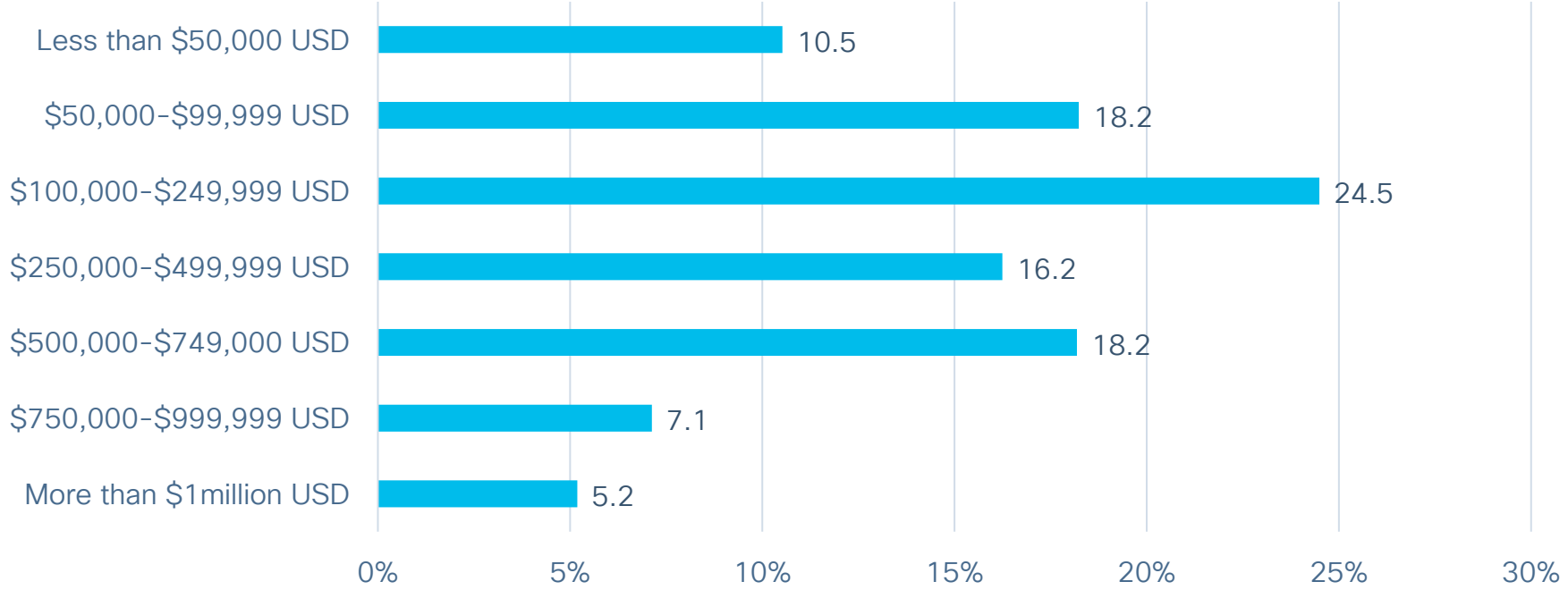
41% have about $250-$500K as their average cost of an hour of downtime, 25% have it higher

How much is the cost of downtime for your organization per hour?



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Source: Full Stack Observability Thought Leadership, IDC, March, 2023

Full Stack Observability Survey: Summary Focal Points

Current State (5/5)

Observability well established as key tactical and strategic function with vital benefits, exec support, rising budgets.

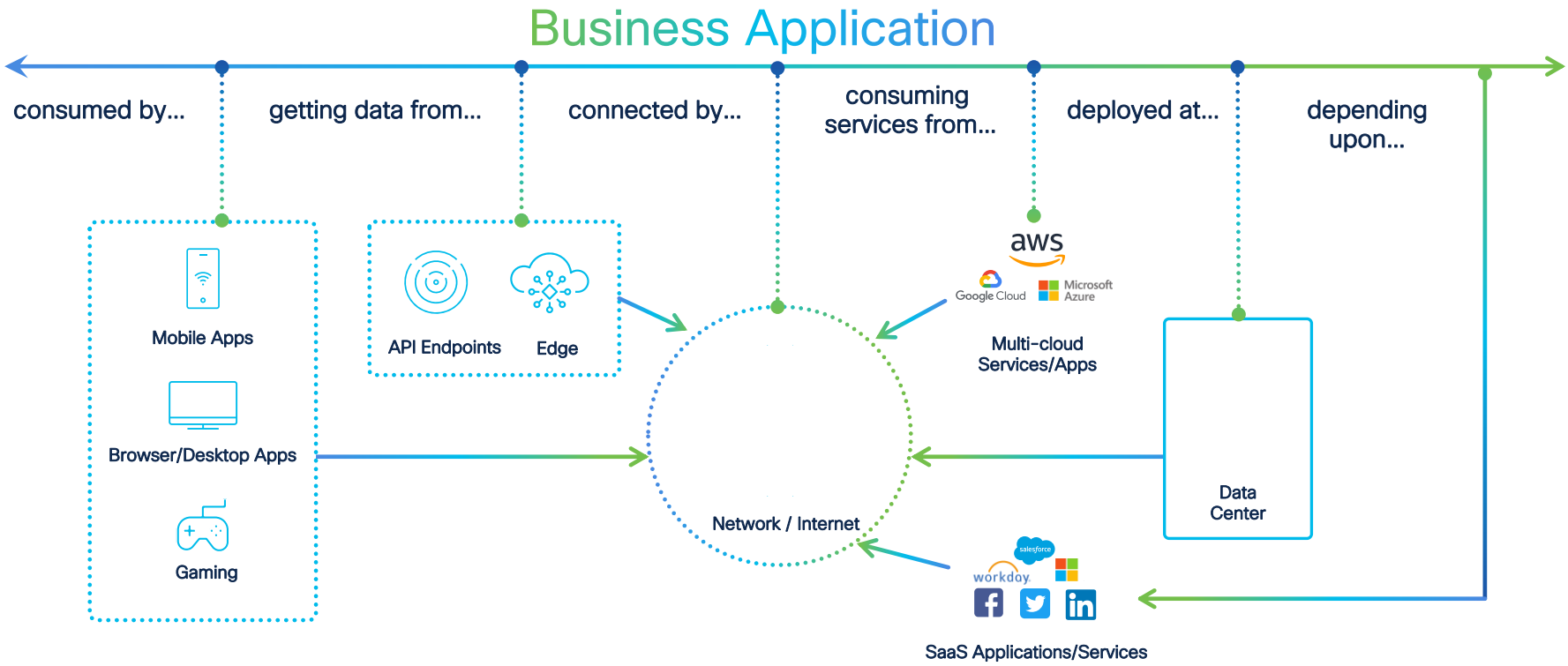
Observability seen as a primary tool in strengthening IT teamwork – with special emphasis on IT/Sec/Cloud Ops.

IT uses an abundance of observability tools… and management gaps persist.

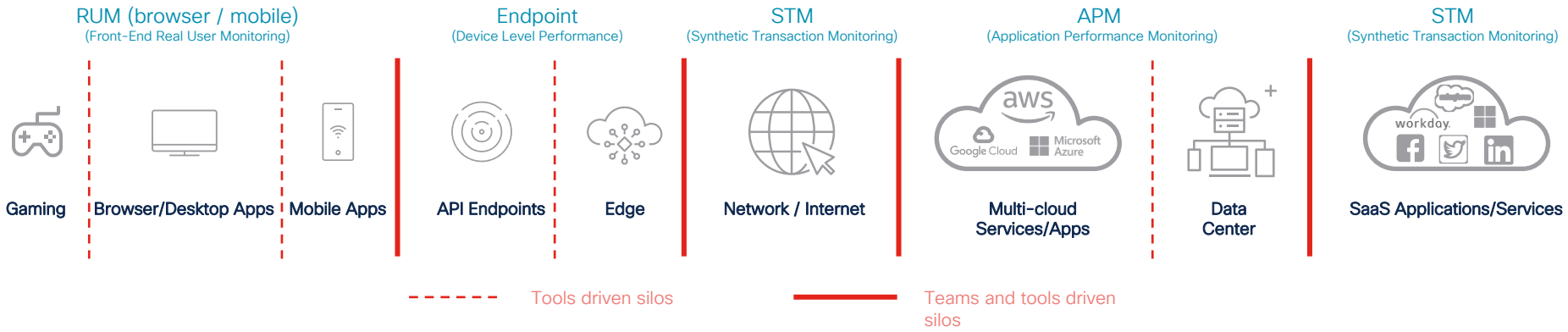
Significant problems: High TCO, Data access/use, IT productivity, Delayed resolution/mitigation efforts, limited flexibility, narrow use cases…

Customers positive perceptions in data collection/correlation, digital experience monitoring, and observability use and unity a mismatch to challenges, limitations, and expected returns. Raise the bar!

Customer Digital Experience journey



Customer Digital Experience Monitoring – without FSO



5 hours to triage and recover from an end-user experience incident !

Customer Digital Experience Monitoring- with Cisco FSO

< 15 min to triage and recover from the same incident !

Full-Stack Observability use-case:

Customer Digital Experience Monitoring

(Real-time, data-driven contextualized and correlated: RUM, session replay, synthetics, application dependency mapping, APM, root-cause analysis, etc.)

Gaming | Browser/Desktop Apps | Mobile Apps | API Endpoints | Edge | Network / Internet | Multi-cloud Services/Apps | Data Center | SaaS Applications/Services

Agenda

- Full Stack Observability survey
  - Current State
  - Solutions
  - Strategies
- Conclusion

Full Stack Observability Survey: Summary Focal Points

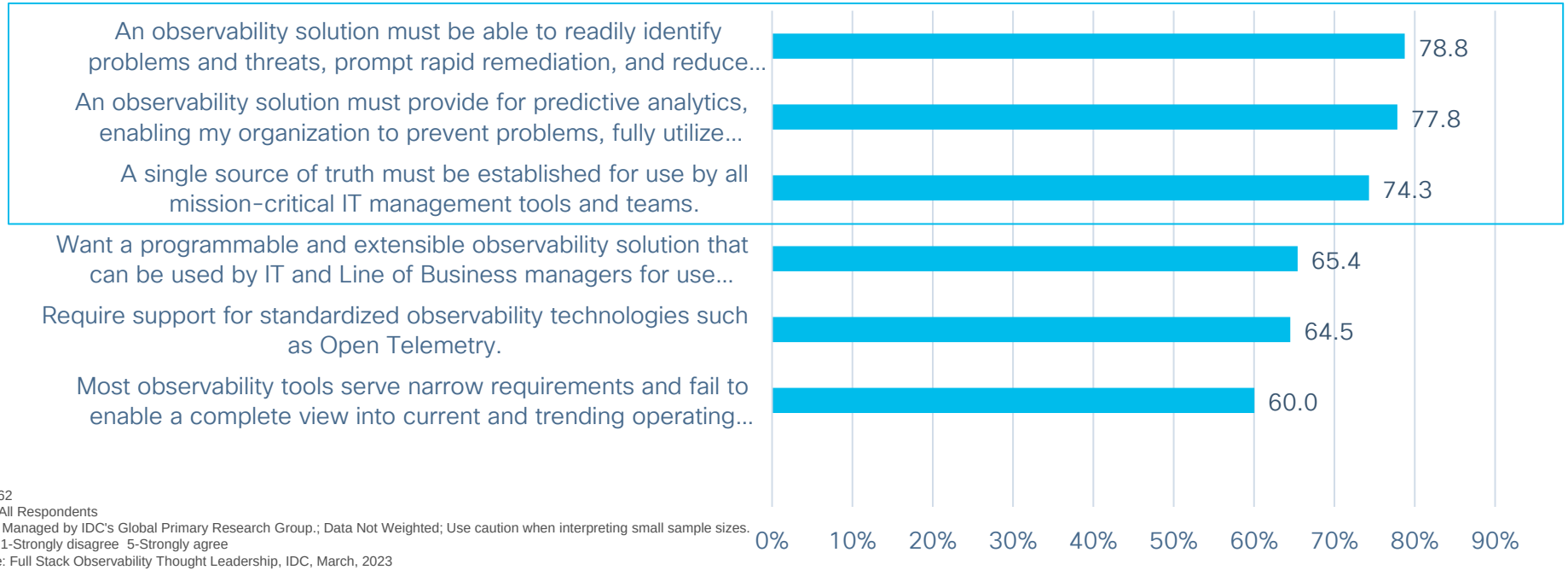
Solutions (2/5)

Data. Data. Data. Comprehensive sourcing, Complex correlation. Cross-org sharing. A focus on a single source of truth!

Intelligent analytics linked to precise automated actions. Building realization that AI/ML-driven analysis can drive big gains in service quality and staff productivity.

Observability Solutions Must Have Breath and Depth of Data Collection and Effective Analytics – Single Source of Truth

In examining observability solutions adopted or to be adopted within your organization, to what extent do you agree with each of the following statements about observability solutions?



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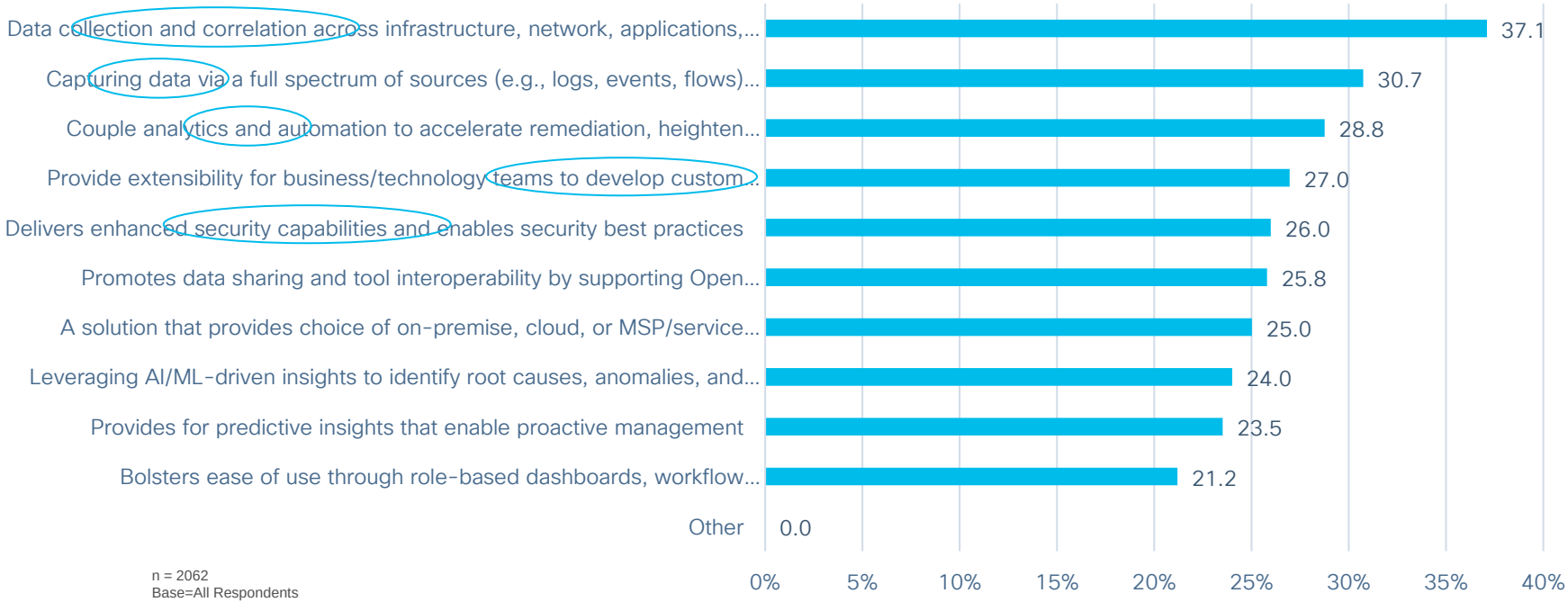
Scale: 1-Strongly disagree 5-Strongly agree
Source: Full Stack Observability Thought Leadership, IDC, March, 2023

Automation is Third on the List of Important Observability Attributes, Custom Use Cases Fourth, Security Fifth

What are the most important attributes of a comprehensive observability solution that unifies infrastructure, network, applications, cybersecurity, and digital experience measurement and management?



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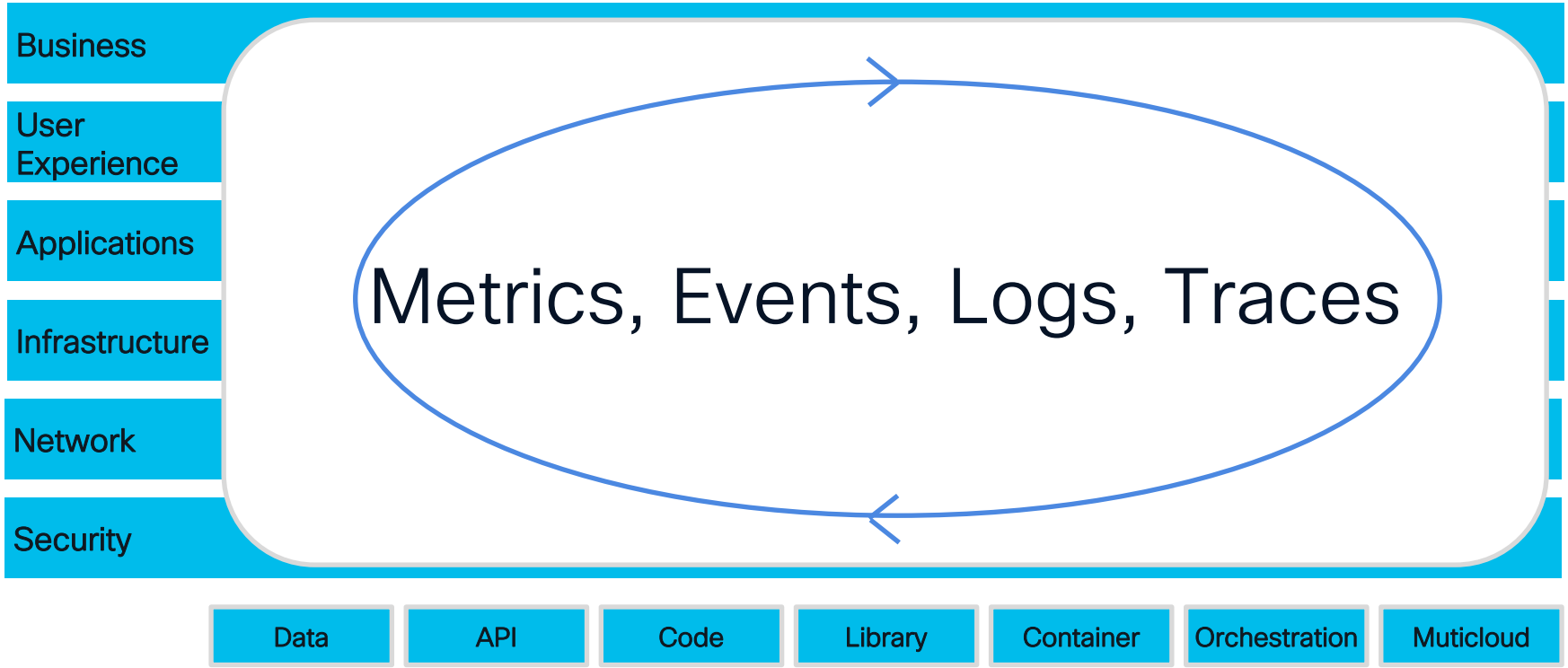
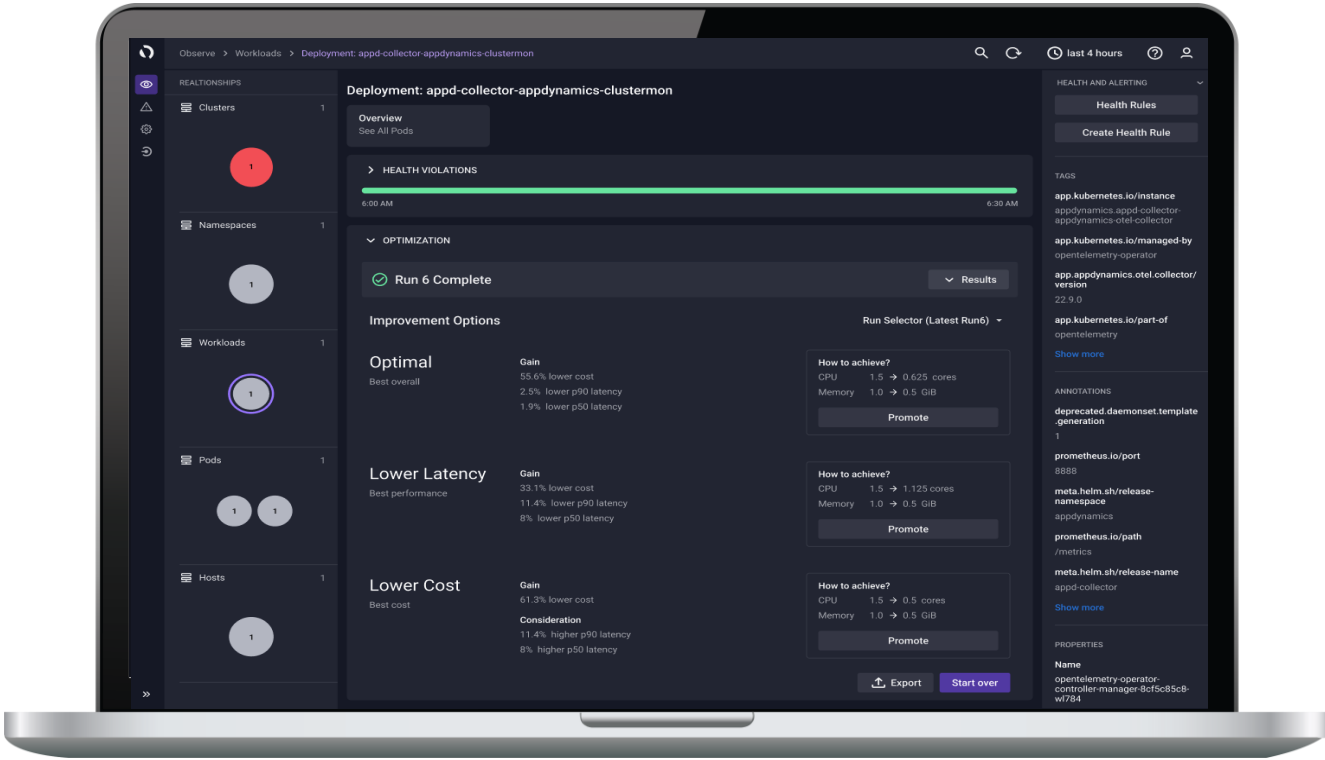


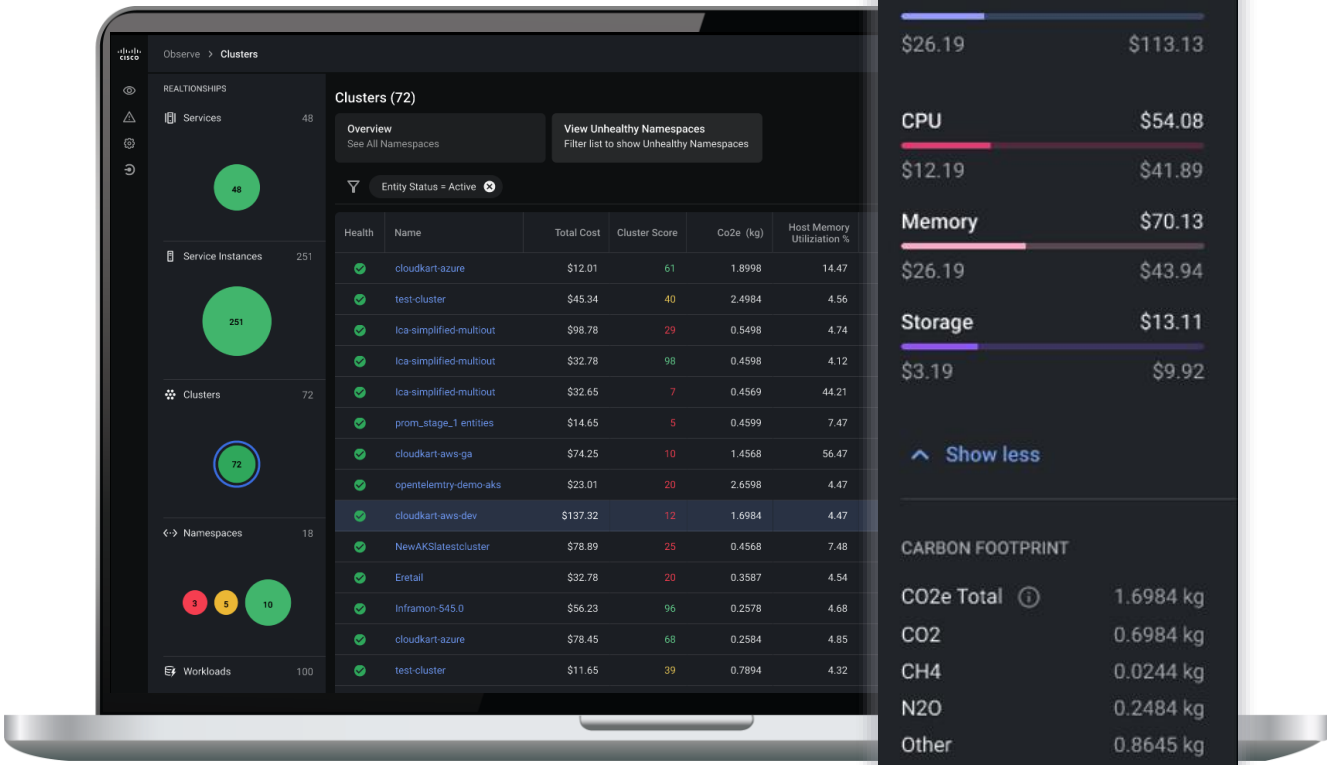
Application Resource Optimizer by Cisco

- Provide deeper insights into a Kubernetes workload and provide visibility into the workload's resource utilization
- Analyse and optimize application workloads to maximize resource usage and reduce excessive cloud spend



Cost Insights by Cisco

- Allocation vs Utilization
  - Compare allocation of resources to usage
  - Understand usage trends of Compute and Memory
  - Identify over-provisioned resources and saving opportunities
- Helping Customers become Sustainable
  - Granular visibility for customers to gauge their environmental impact
  - Identify workloads with high Co2 Impact with lower costs
  - Provide visible usage for ESG reporting
  - Ability to offset carbon footprint by optimizing resources



Full Stack Observability Survey: Summary Focal Points

Solutions (4/5)

Data. Data. Data. Comprehensive sourcing, Complex correlation. Cross-org sharing. A focus on a single source of truth!

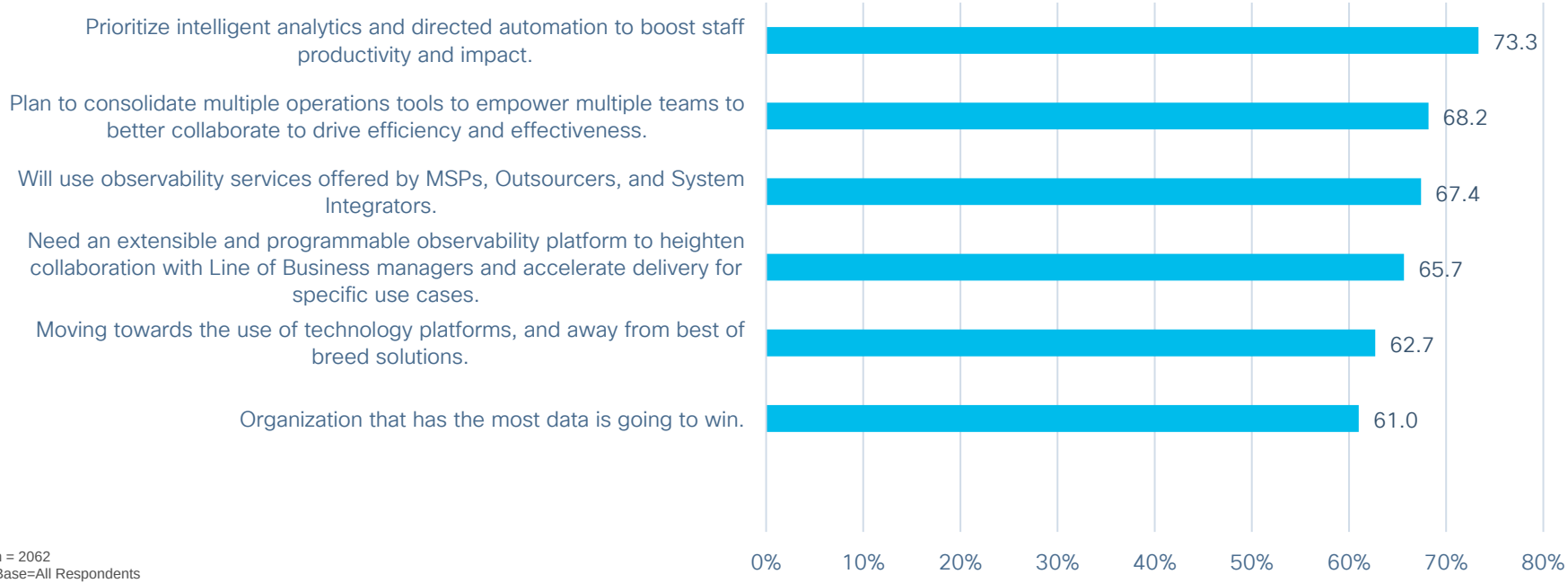
Intelligent analytics linked to precise automated actions. Building realization that AI/ML-driven analysis can drive big gains in service quality and staff productivity.

Consolidation, convergence, and unification leads towards platforms vs best-of-breed solutions.

Ready integration and extensibility viewed as valuable across IT AND the business

Data and Extensibility Matter, So does Tool Consolidation and Platforms

Considering your organization's approach to observability across infrastructure, network, applications, cybersecurity, and digital experience management, to what extent do you agree with each of the following statements about IT solutions?



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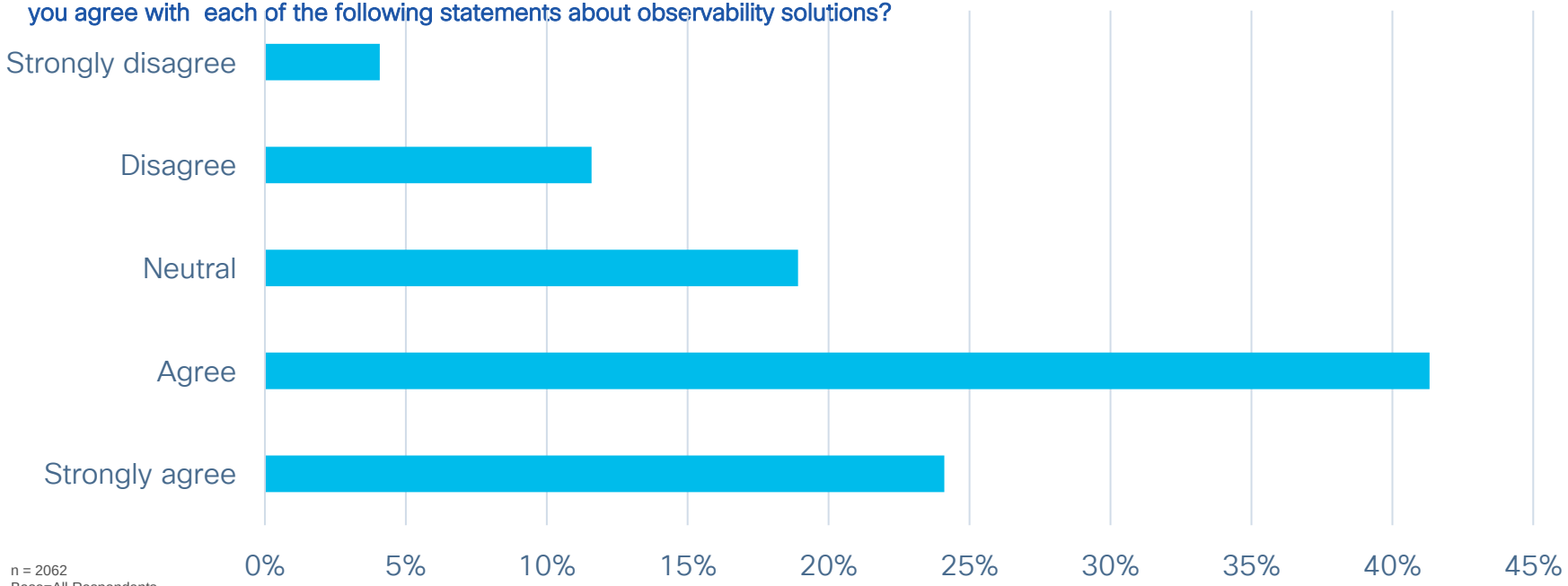
Notes: Managed by IDC's Global Primary Research Group.; Data Not Weighted; Use caution when interpreting small sample sizes.
Scale: 1-Strongly disagree 5-Strongly agree
Source: Full Stack Observability Thought Leadership, IDC, March, 2023

65% Agree that a Programmable and Extensible Observability Solution Can be Used by IT and Business for Specific Use cases

Want a programmable and extensible observability solution that can be used by IT and Line of Business managers for use cases specific to our business and environment – In examining observability solutions adopted or to be adopted within your organization, to what extent do you agree with each of the following statements about observability solutions?



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Cisco Full-Stack Observability scope

Observe

Enhance application performance, network intelligence and end user experience

Secure

Address application security with business risk observability

Optimize

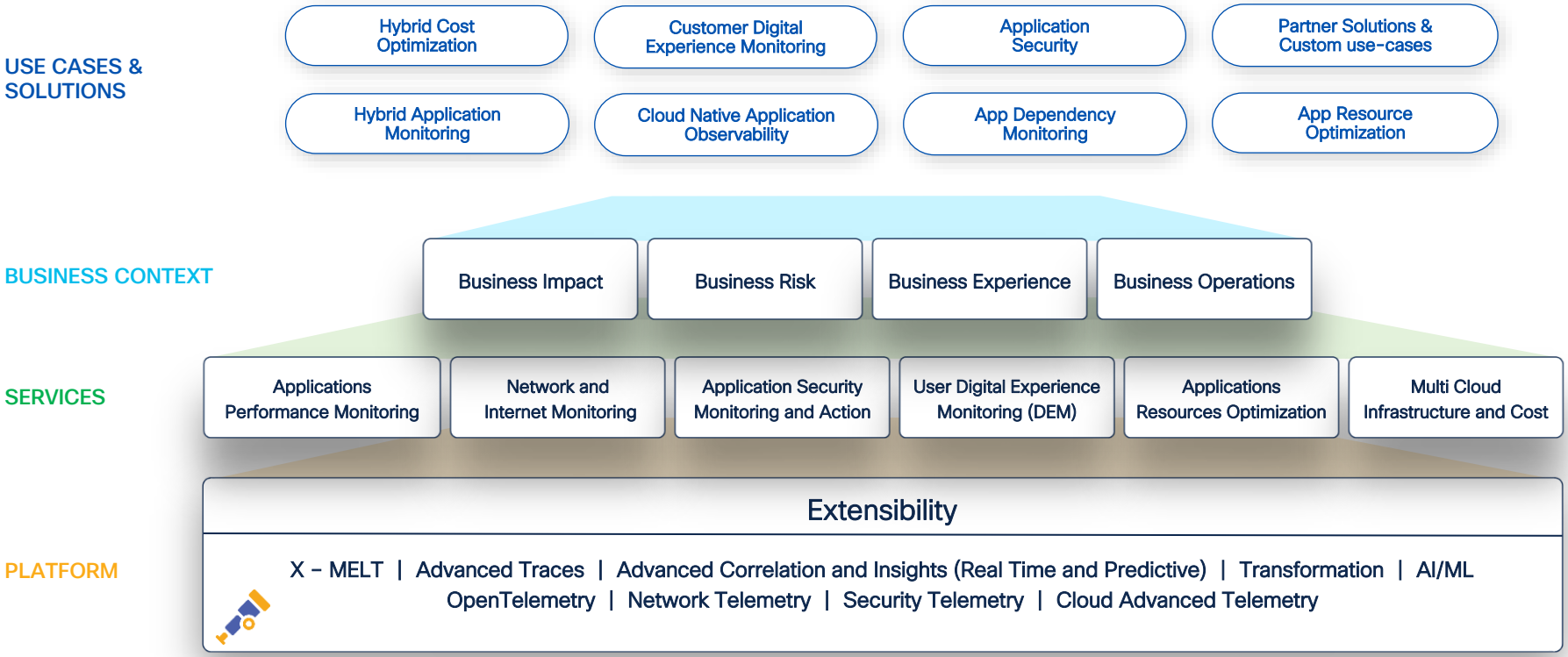
Optimize resources, costs, and sustainability

Extend

Open and programmable, empowering a new observability ecosystem

Across the full-stack, tied to Business context

Cisco Full-Stack Observability Architecture foundation



Cisco FSO Platform – Apps and Modules (by Jun/2023)

Application

Cloud Native App Observability
Cisco

The world's leading observability solution.

Learn more | Subscribe

For Cloud Native Application Observability

AIOps
Cisco

Observe your Sphere environment across Center, hosts, VMs, pods, clusters. Kubernetes. etc

Learn more | Subscribe

For Cloud Native Application Observability

App Resource Optimizer
Cisco

Optimize your applications today. Application Resource Optimizer detects areas of improvement and facilitates your optimizations.

Learn more | Subscribe

For Cloud Native Application Observability

Cost Insights
Cisco

View insights into the cost of your IT operations across your entire stack.

Learn more | Subscribe

For Cloud Native Application Observability

Sustainability
Climatiq

Climatiq simplifies the process of calculating your environmental footprint.

Learn more | Subscribe

For Cloud Native Application Observability

Evolutio Fintech
Evolutio

Monitor your credit card authorizations across the entirety of your payment processing infrastructure

Learn more | Subscribe

For Cloud Native Application Observability

Cloud Forecaster
Kanari

Capacity planning - forecast your data using our proprietary machine learning models. See your risk factors.

Learn more | Subscribe

For Cloud Native Application Observability

vSphere Observability
CloudFabrix

Observe your Sphere environment across Center, hosts, VMs, pods, clusters. Kubernetes. etc

Learn more | Subscribe

Cisco FSO Platform Extensibility – Solution Package

A declarative collection of Cisco FSO platform components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Full Stack Observability Survey: Summary Focal Points

Solutions

Data. Data. Data. Comprehensive sourcing, Complex correlation. Cross-org sharing. A focus on a single source of truth!

Intelligent analytics linked to precise automated actions. Building realization that AI/ML-driven analysis can drive big gains in service quality and staff productivity.

Consolidation, convergence, and unification leads towards platforms vs best-of-breed solutions.

Ready integration and extensibility viewed as valuable across IT AND the business

Equal emphasis on proactive and reactive management capabilities. Match to industry movement to predict, prevent, prescribe, and protect.

Kanari Capacity Planner and Forecaster (by Kanari)

Overview

The Kanari Capacity Planner and Forecaster module provides forecasting on resource consumption based on historical data analysis to enable predictive analytics and capacity planning.

Use Case

Capacity Planning

Data Sources

- Ingest OTEL metric data to Cisco FSO platform
- Extract metric data from Cisco FSO to external Kanari ML facility
- Ingest OTEL ML output to Cisco FSO platform in the form of events with a “risk” factor (metric)

Customer Value

Customers can see time-series data associated with capacity planning

Customers can see forecasted events with risk factors that have been determined through predictive ML algorithms (ARIMA, SARIMA, LSTM)

Customers can view insights into capacity planning risk factors

Agenda

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Full Stack Observability Survey: Summary Focal Points

Strategies

High value assigned outcomes (vs tech capabilities) – Digital innovation, IT productivity, operational efficiency, Automation, Reduced business risk

Supplier role intensifying – Customization, Customer success, Technology innovation, Cloud/Multicloud management, Ecosystem

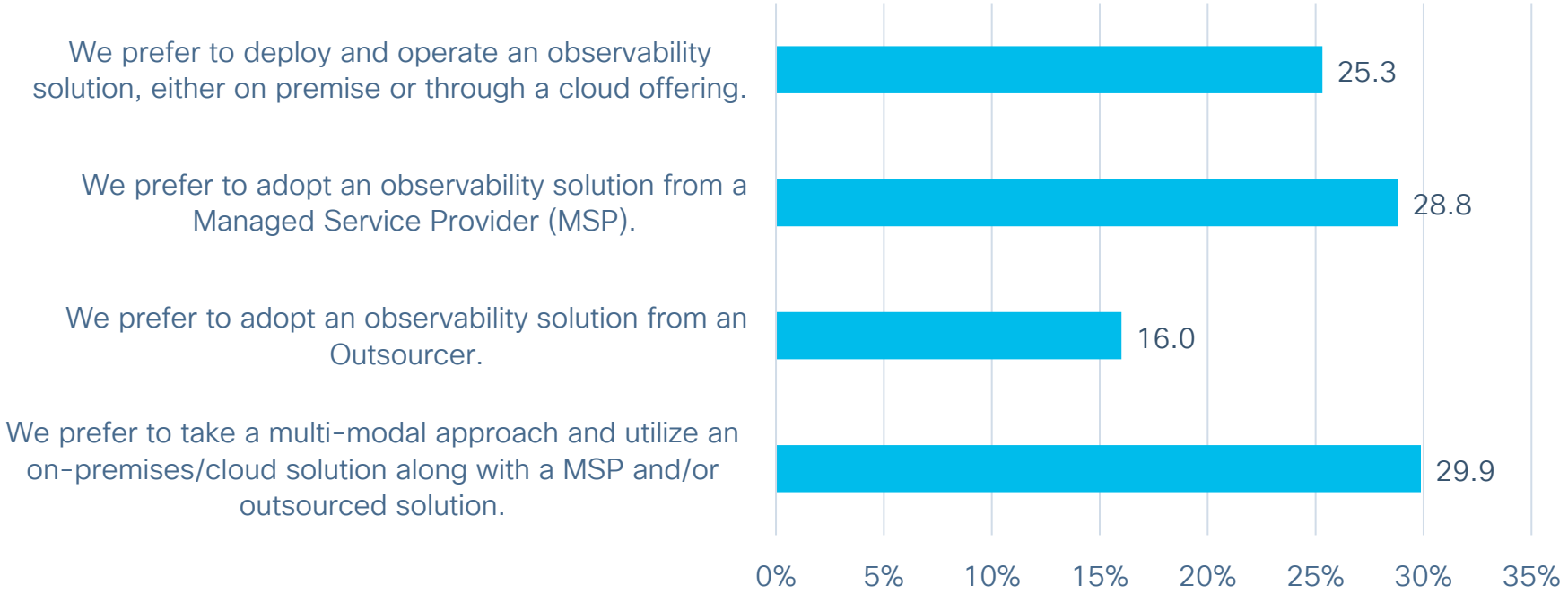
Observability is a hierarchical Top-Down capability within IT. ITOps drives use and unification. Heightening role for Security.

Operational responsibilities for observability spread rather equally across customer, MSP, and mix of both. For staff, automation, security, and data skills grow.

Observability to increase influence over decision-making in IT and lines of business

Customers Want Deployment Options

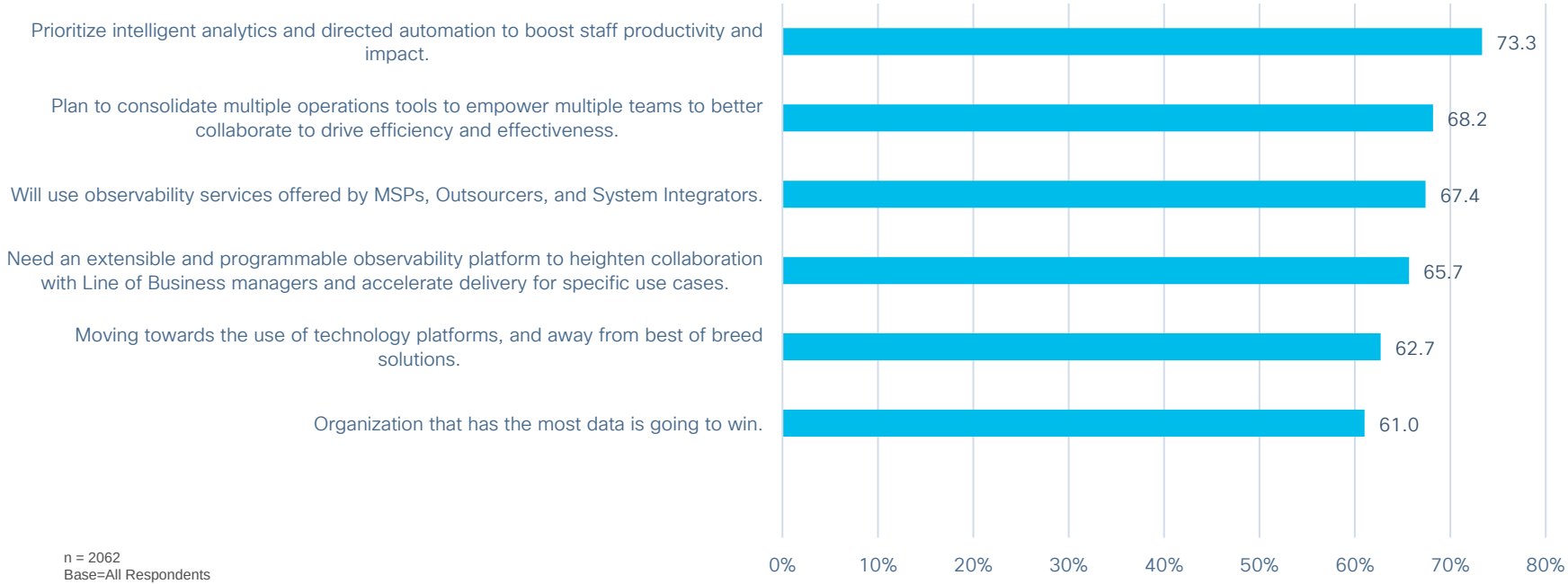
How does your organization prefer to utilize a monitoring/observability solution?



n = 2062
Base=All Respondents
Notes: Managed by IDC's Global Primary Research Group.; Data Not Weighted; Use caution when interpreting small sample sizes.
Source: Full Stack Observability Thought Leadership, IDC, March, 2023

Automation/Analytics, Tool Consolidation, and MSP Solutions Are Driving Solution Discussions

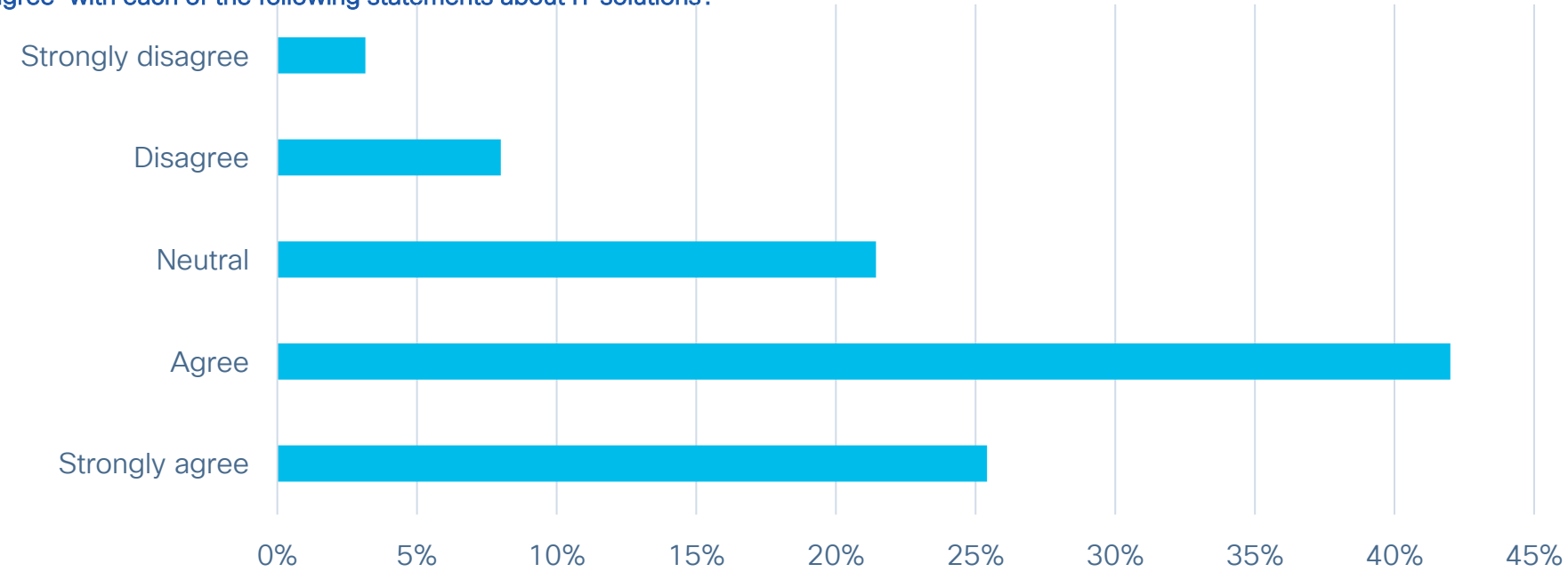
Considering your organization's approach to observability across infrastructure, network, applications, cybersecurity, and digital experience management, to what extent do you agree with each of the following statements about IT solutions?



n = 2062
Base=All Respondents
Notes: Managed by IDC's Global Primary Research Group.; Data Not Weighted; Use caution when interpreting small sample sizes.
Scale: 1-Strongly disagree 5-Strongly agree
Source: Full Stack Observability Thought Leadership, IDC, March, 2023

67% Agree that MSPs, Outsourcers, and SIs are an Acceptable Approach for Observability Services

Will use observability services offered by MSPs, Outsourcers, and System Integrators – Considering your organization's approach to observability across infrastructure, network, applications, cybersecurity, and digital experience management, to what extent do you agree with each of the following statements about IT solutions?



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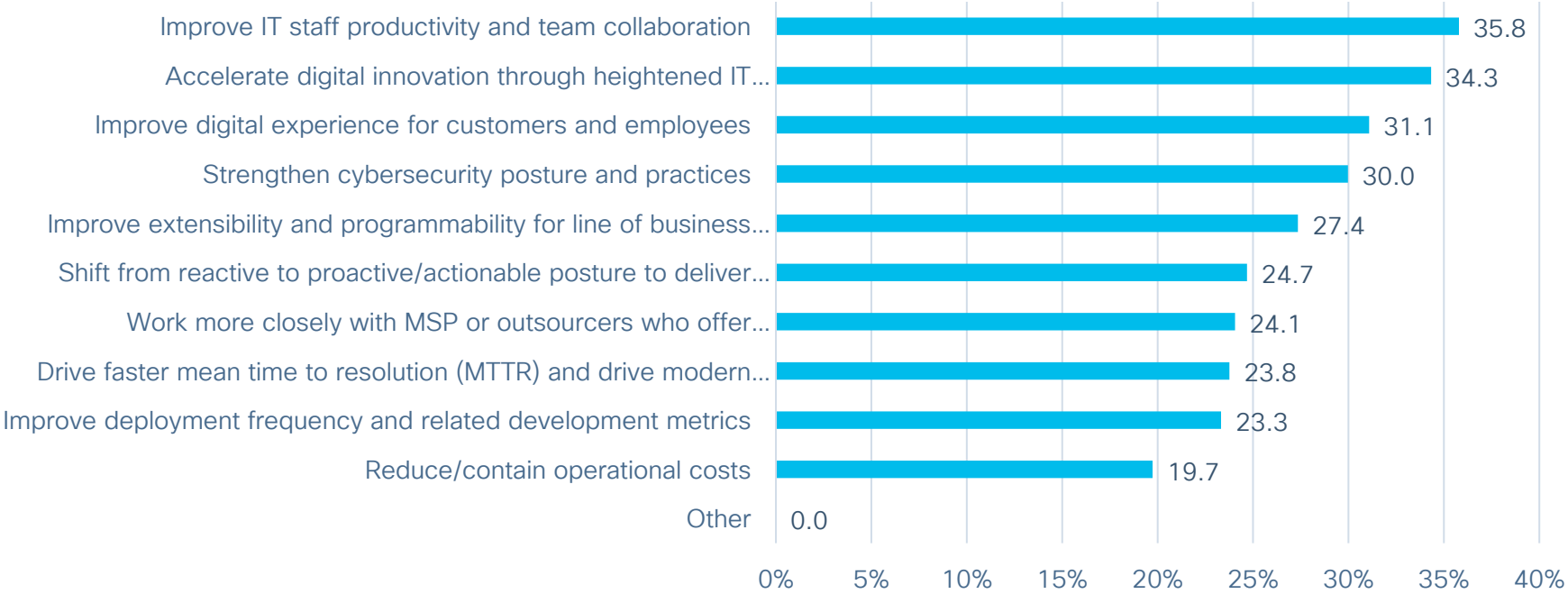
Notes: Managed by IDC's Global Primary Research Group.; Data Not Weighted; Use caution when interpreting small sample sizes.
Scale: 1-Strongly disagree 5-Strongly agree
Source: Full Stack Observability Thought Leadership, IDC, March, 2023

Staff Productivity, Faster Response Times, Customer Experience, and Improved Cybersecurity Are leading Benefits

What are the biggest benefits when applying comprehensive observability capabilities to the management of infrastructure, network, applications, cybersecurity, and digital experience?



n = 2062
Base=All Respondents
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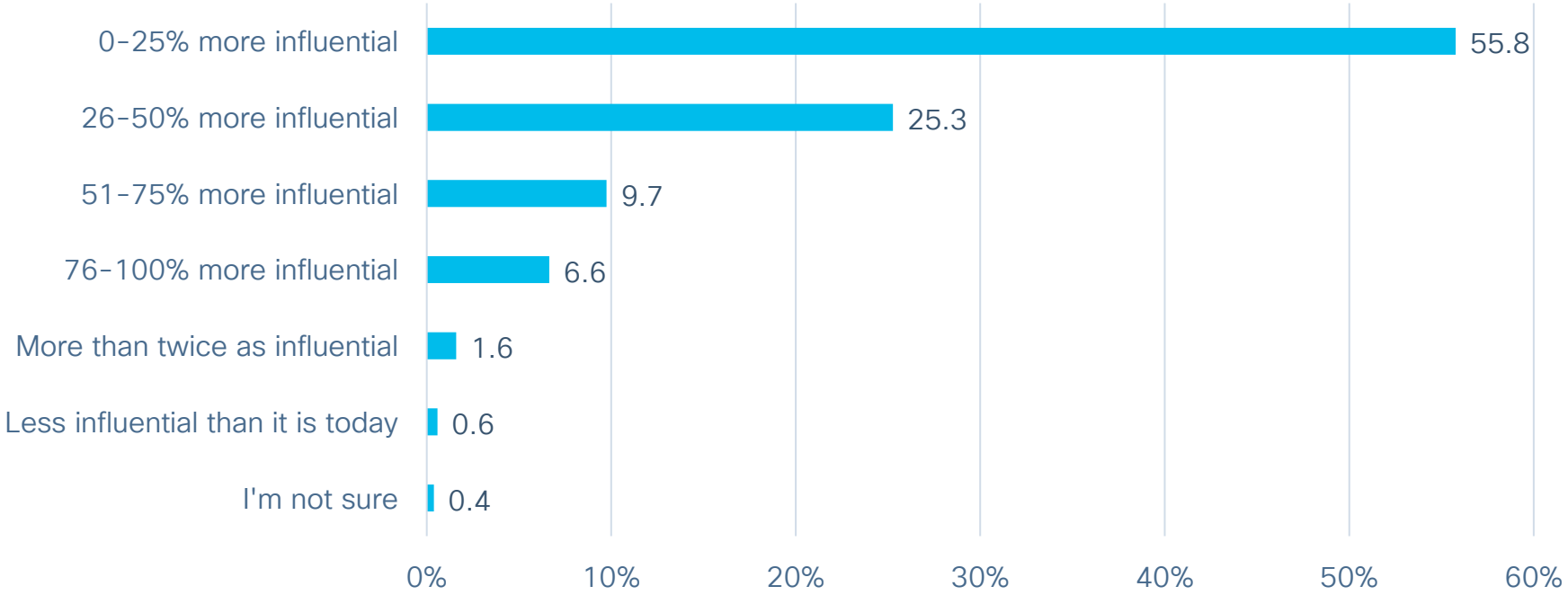
Source: Full Stack Observability Thought Leadership, IDC, March, 2023

Security Influence is Expected to Grow with Observability Decisions Over the Next Two Years

In 2 years' time, how influential will observability be to your security decision-making compared to today?



n = 2062
Base=All Respondents
Notes: Managed by IDC's Global Primary Research Group.; Data Not Weighted; Use caution when interpreting small sample sizes.
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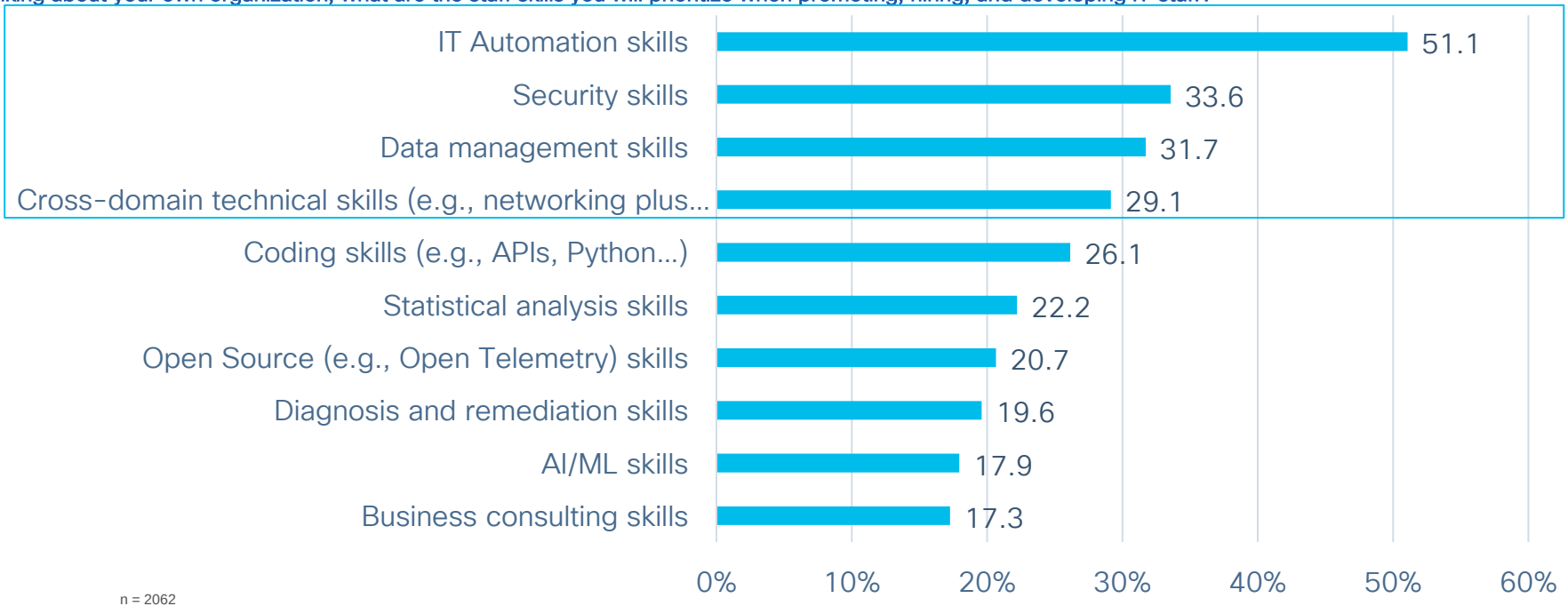
Automation, Security, Data Management, and Cross Domain Skills Lead Observability Needs

Below are some observability-related technical skills needed for the management of infrastructure, network, applications, cybersecurity, and digital experience. Thinking about your own organization, what are the staff skills you will prioritize when promoting, hiring, and developing IT staff?



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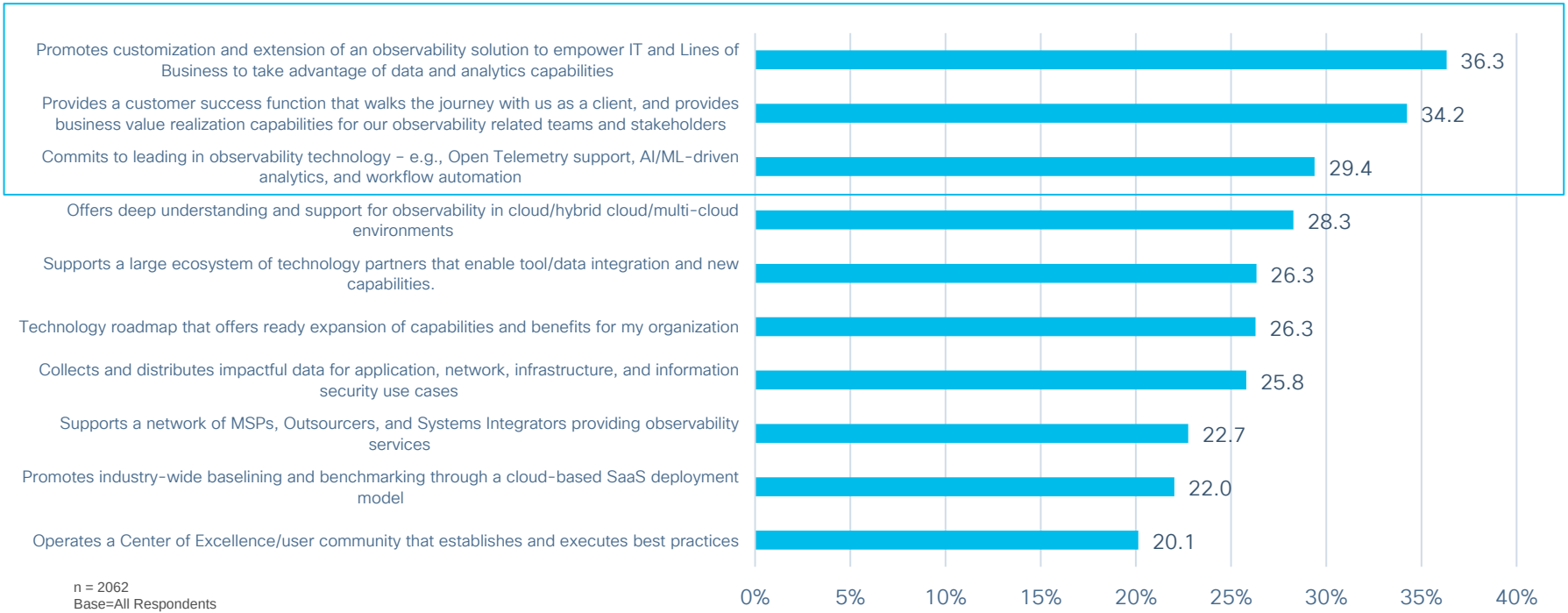
IT and Business “In-Context” Customization, Consultative sales approach with a Journey and Value centric Model, and Leading Technology for a multi- cloud World are Top Vendor Expectations

What are your top expectations for the vendor/provider of an observability solution?



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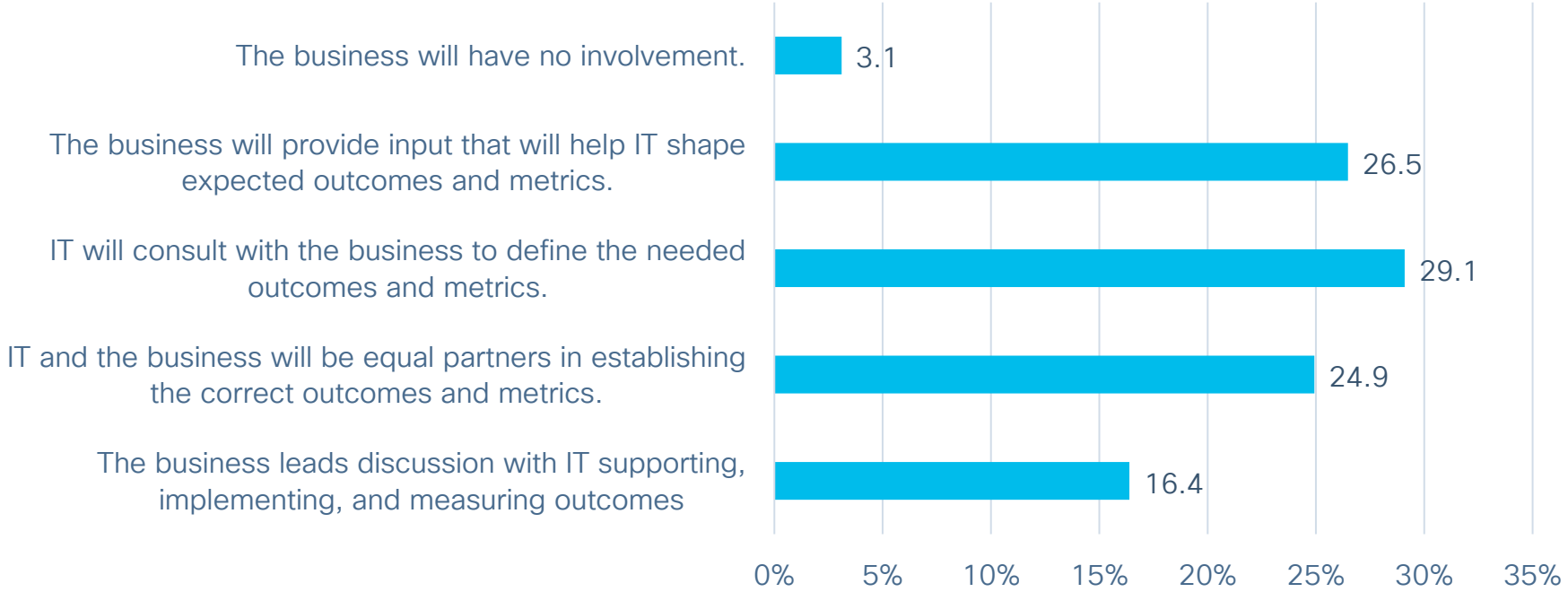
97% of Organizations Have Business Involvement of Some Type, 16% of the Time the Business Leads the Observability Outcomes Discussion

What involvement do you expect business managers and line of business executives to be involved with observability outcomes?



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Full Stack Observability Survey: Conclusion

Respondents looking to unify their data, analysis, actions, toolsets, practices, and teams to bolster operational excellence and digital business execution and innovation.

State

Observability well established as key tactical and strategic function with vital benefits, exec support, rising budgets.

Observability seen as a primary tool in strengthening IT teamwork – with special emphasis on IT/Sec/Cloud Ops.

IT uses an abundance of observability tools… and management gaps persist.

Significant problems: High TCO, Data access/use, IT productivity, Delayed resolution/mitigation efforts, limited flexibility, narrow use cases…

Customers positive perceptions in data collection/correlation, digital experience monitoring, and observability use and unity a mismatch to challenges, limitations, and expected returns. Raise the bar!

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Fill out your session surveys!

Attendees who fill out a minimum of four session surveys and the overall event survey will get **Cisco Live-branded socks** (while supplies last)!

Attendees will also earn 100 points in the **Cisco Challenge** for every survey completed.

These points help you get on the leaderboard and increase your chances of winning daily and grand prizes

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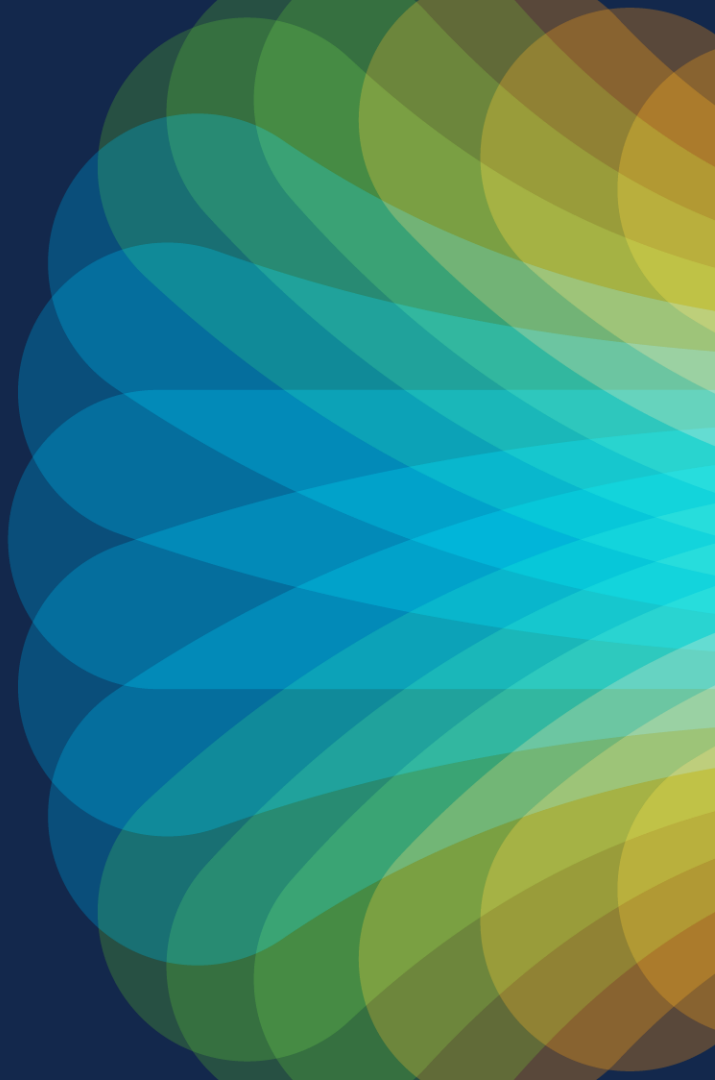
- Book your one-on-one Meet the Engineer meeting
- Attend the interactive education with DevNet, Capture the Flag, and Walk-in Labs
- Visit the On-Demand Library for more sessions at www.CiscoLive.com/on-demand

The bridge to possible

Thank you

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