



# Securing your digital transformation

Corporate IR Presentation  
September 2022



# Safe Harbor

## Forward-Looking Statements

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In some cases, you can identify forward-looking statements by terms such as “anticipate,” “believe,” “continue,” “contemplate,” “could,” “estimate,” “expect,” “explore,” “intend,” “likely,” “may,” “plan,” “potential,” “predict,” “project,” “should,” “target,” “will” or “would” or the negative of these terms or other similar words. Zscaler based these forward-looking statements largely on its current expectations and projections about future events that it believes may affect its business. Actual outcomes and results may differ materially from those contemplated by these forward-looking statements. All forward-looking statements in this message are based on information available to us as of the date hereof, and we do not assume any obligation to update the forward-looking statements provided to reflect events that occur or circumstances that exist after the date on which they were made.

# Zscaler highlights



## Pioneer and leader in cloud security

Founded in 2007 – Redefining network security, with the world's largest in-line security cloud platform and a scalable cloud architecture.



## \$72B Serviceable market opportunity <sup>(1)</sup>

Opportunity to secure hundreds of millions of users and workloads, plus billions of IoT/OT devices.



## Long-term secular tailwinds

Secure digital transformation is accelerating and top of mind in C-Suite.  
**Key trends:** Cloud shift, mobility, IoT, rising threats, legacy phase-out.



## Sustainable competitive advantage

First mover at massive scale, delivering measurable customer value.  
Virtuous cycle of growing scale, focused innovation, and data / insight.



## Attractive financial profile

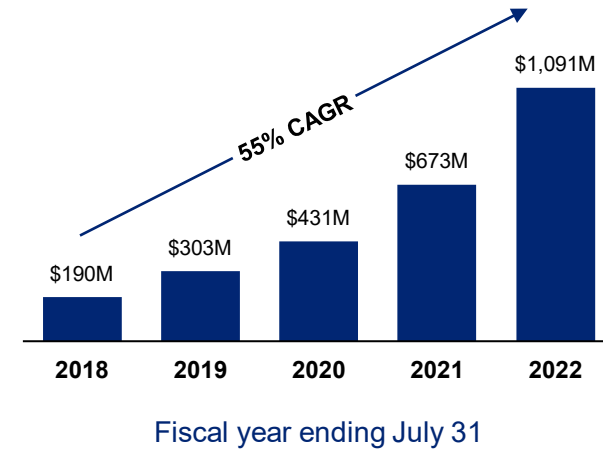
- >\$1B recurring revenue <sup>(2)</sup>
- >125% Dollar-based Net Retention Rate ("NRR") <sup>(2)</sup>
- 81% Gross profit Margin, 21% Free cash flow ("FCF") margins <sup>(2)</sup>
- Performing beyond Rule-of-40



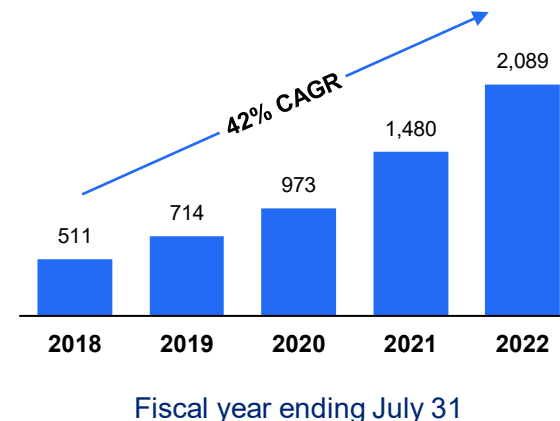
## Experienced, founder-led team

Conviction to build a lasting company with sustainable long-term growth, with world-class sales execution and a high-performing culture.

## Total revenue



## \$100K+ ARR customers



1) Based on our analysis of ZoomInfo worldwide workforce data for organizations with 2k+ employees and 650 Group's workload market forecast for 2020.

2) Recurring Revenue, Dollar-based NRR, Gross profit margin and FCF margins for FY22.

# Zscaler: The leader in secure digital transformation

## Transformational zero trust platform

Any-to-any connectivity

Pioneer and Market leader

**11** Consecutive years of  
Gartner MQ leadership

Largest security cloud (150 DCs)

**250B** Daily requests  
>20x Google searches <sup>(1)</sup>

Highly rated

**>70** Net Promoter Score  
(Avg SaaS NPS is 30)



## Company highlights

NASDAQ-listed: **ZS**

Member of NASDAQ-100 index

**\$1 billion** annual recurring revenue

**61% growth** y/y in revenue Q4'22

**4,975** employees

## Market leader across verticals — 40% of Fortune 500 and 30% of Global 2000

Engineering &  
Manufacturing



**7** OF THE **TOP 10**

Household &  
Personal Products



**9** OF THE **TOP 10**

Banking & Financial Services  
(outside of China)



**8** OF THE **TOP 10**

Aerospace  
& Defense



**6** OF THE **TOP 10**

Healthcare  
Equipment & Services



**7** OF THE **TOP 10**

Transportation



**6** OF THE **TOP 10**

1) Google's daily search requests are based on estimates from ardorseo.com and internetlivestats.com.

# New category leaders are born when megashifts take place

Zscaler's vision: A new world of cloud and mobility, secured.

Data center and hardware



Applications in the data center



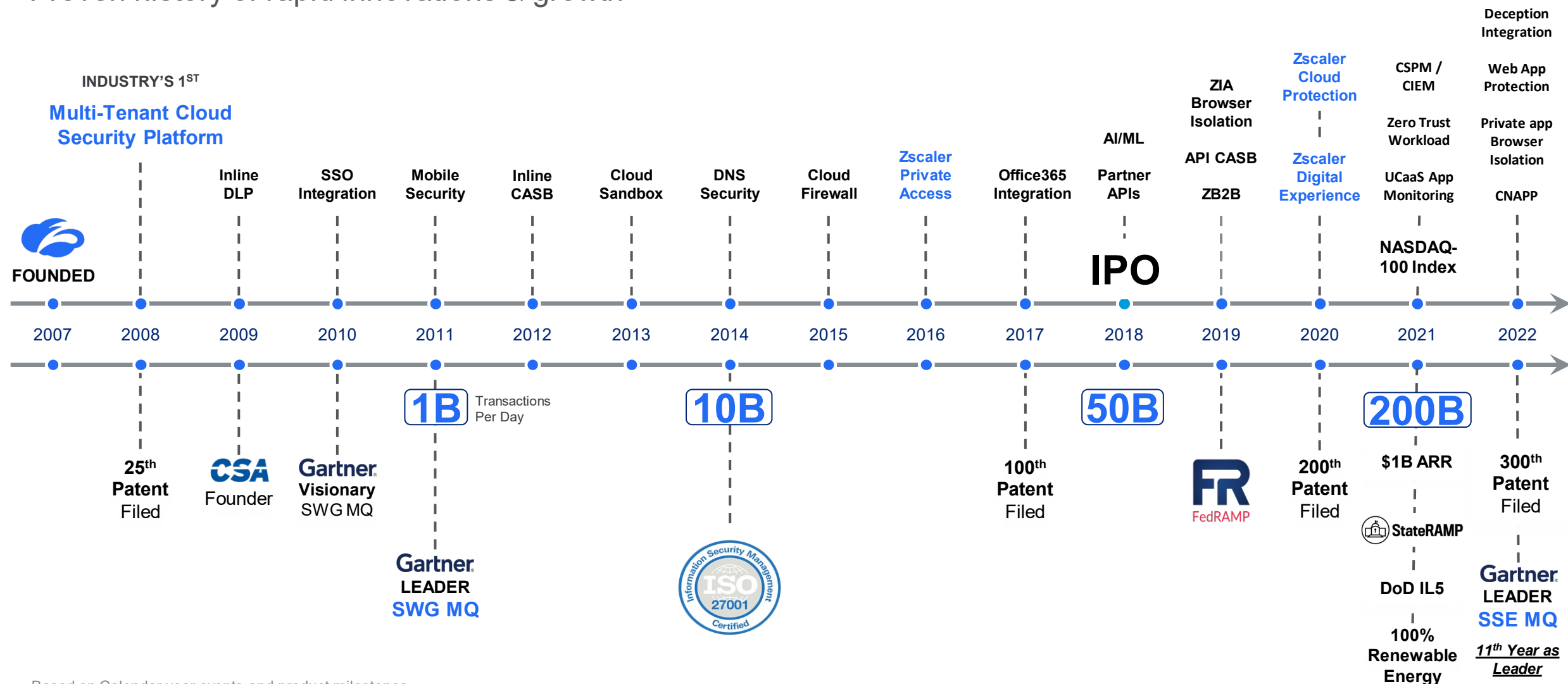
On-Premises security





# Focused innovation engine and extensible platform

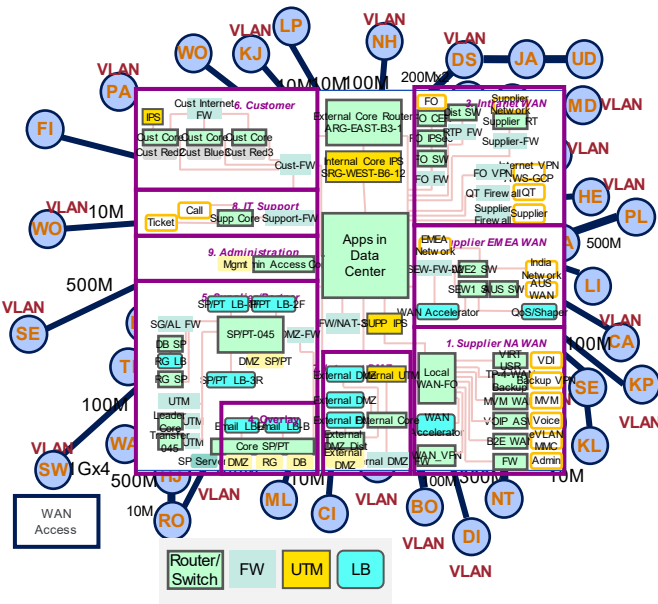
Proven history of rapid innovations & growth



Based on Calendar year events and product milestones

# Phased transformation journey

## Legacy Network and Security Architecture



Hub-and-Spoke Network  
Castle and Moat Security

### Phase 1

#### Zero Trust for Users

Improve your Cyber and data protection  
Secure Internet & SaaS Access  
Secure Private App Access

#### Zero Trust for Workloads

Cloud-to-Internet  
Cloud-to-Cloud, Cloud-to-DC  
App Micro-segmentation

### Phase 2

#### Branch Network & Advanced Security

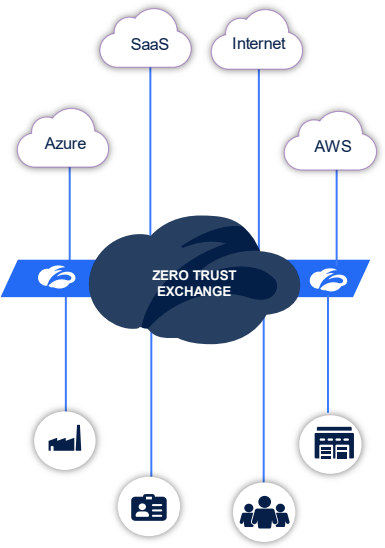
Hub-n-spoke to Zero Trust SD-WAN  
Advanced Threat Protection and DLP

#### SaaS & Workload Posture

CSPM — Protect public cloud data  
CIEM — Entitlements/Permissions

Risk Posture, Simplification and Cost Savings

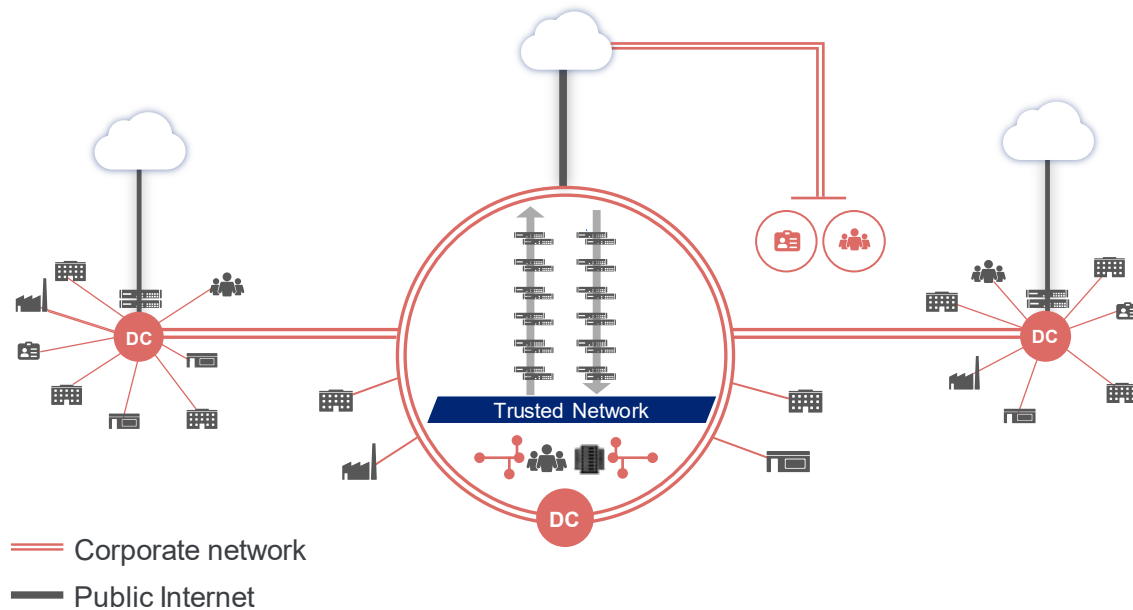
## Zero Trust Architecture



Zero Trust Users, Apps,  
Devices, Machines

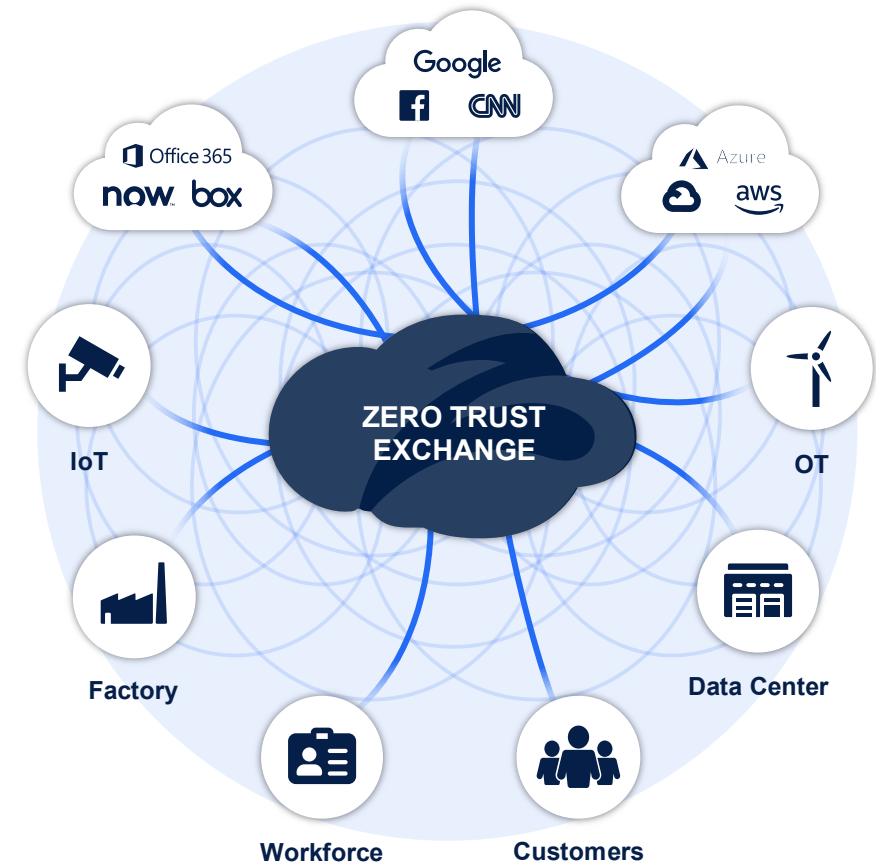
# Driving transition from legacy on prem to cloud / mobile standard

## Today's network security Perimeter defenses



Castle-and-Moat Security  
Hub-and-Spoke Network

## Zero Trust exchange Any-to-any connectivity

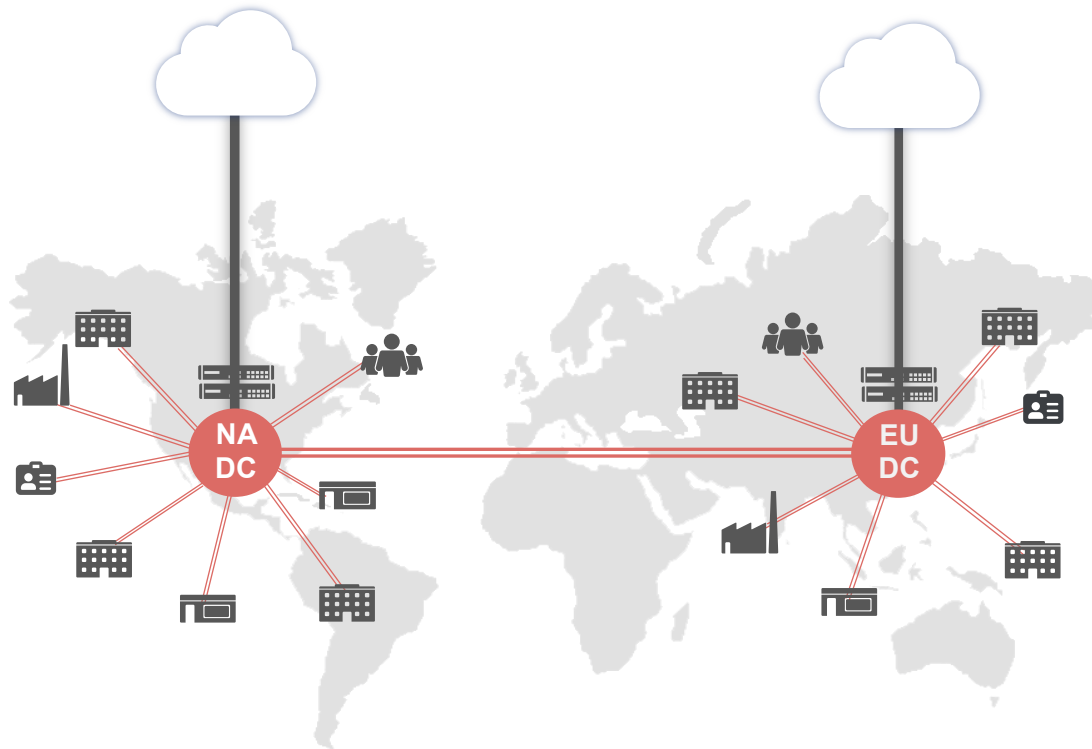




# Traditional IT: Worked well when apps resided in the data center, and employees showed up to the office

## Hub & spoke networks

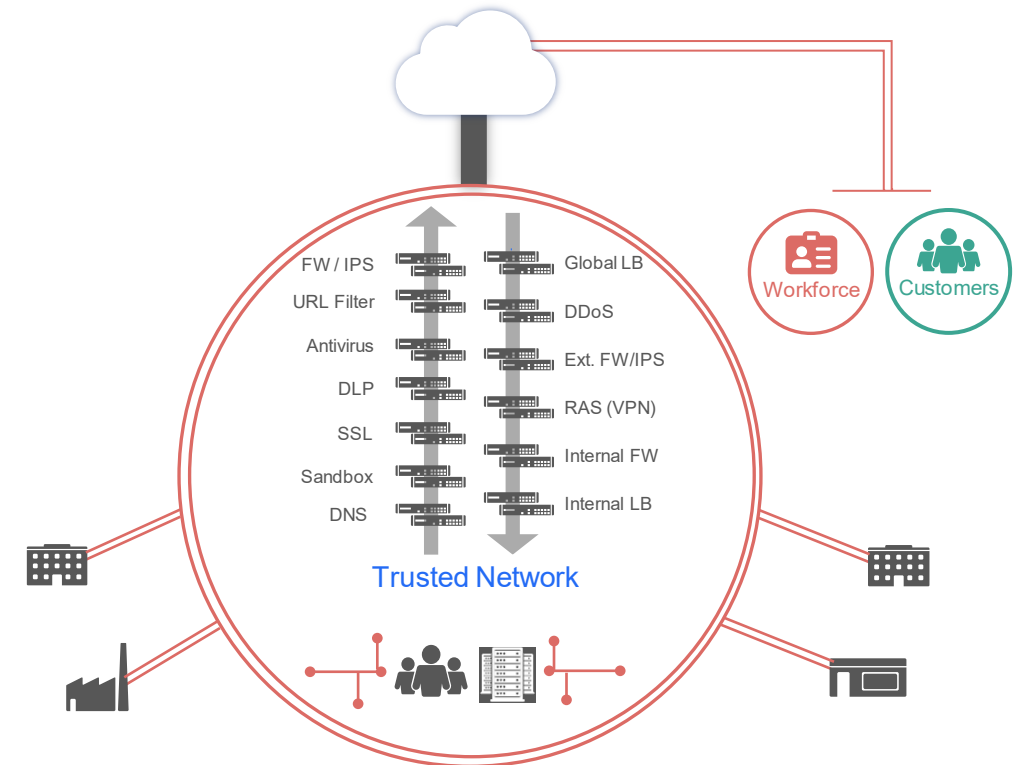
Optimized to connect users to apps in the data center



— Corporate network  
— Public Internet

## Castle & moat security

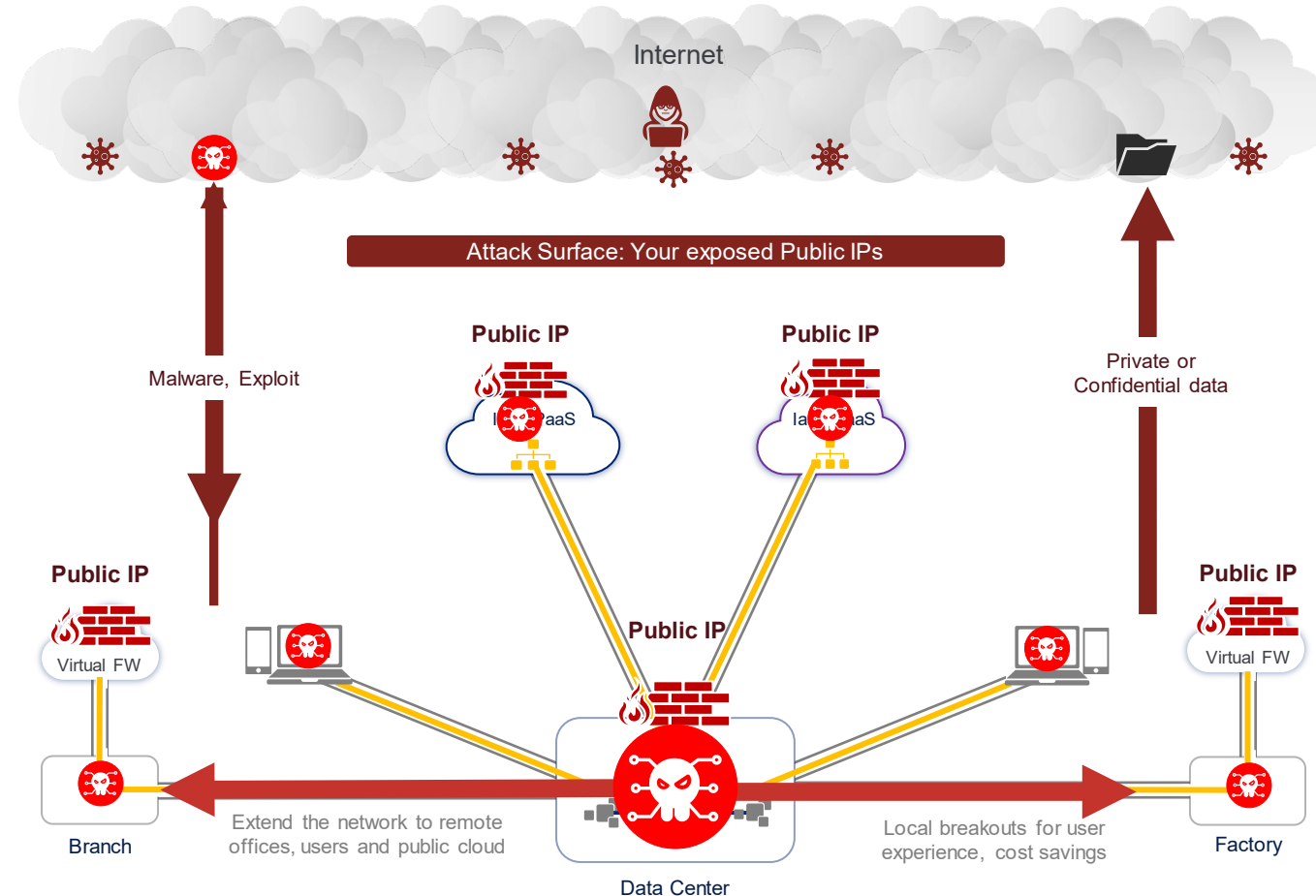
Perimeter security appliances to protect the network



# Why hub-n-spoke network and castle-n-moat security create issues

1 **They find you** Everything exposed to the internet is your attack surface

[Attack Surface Example](#)



2 **They compromise you**

Infect users, devices, workloads

- Phishing, malicious content
- Misconfigurations, vulnerabilities
- Supply chain

[How secure are you?](#)

4 **They steal your data**

Avoid firewall detection

- Data is encrypted, compressed
- Sent to authorized SaaS, IaaS/PaaS
- Protocol tunneling

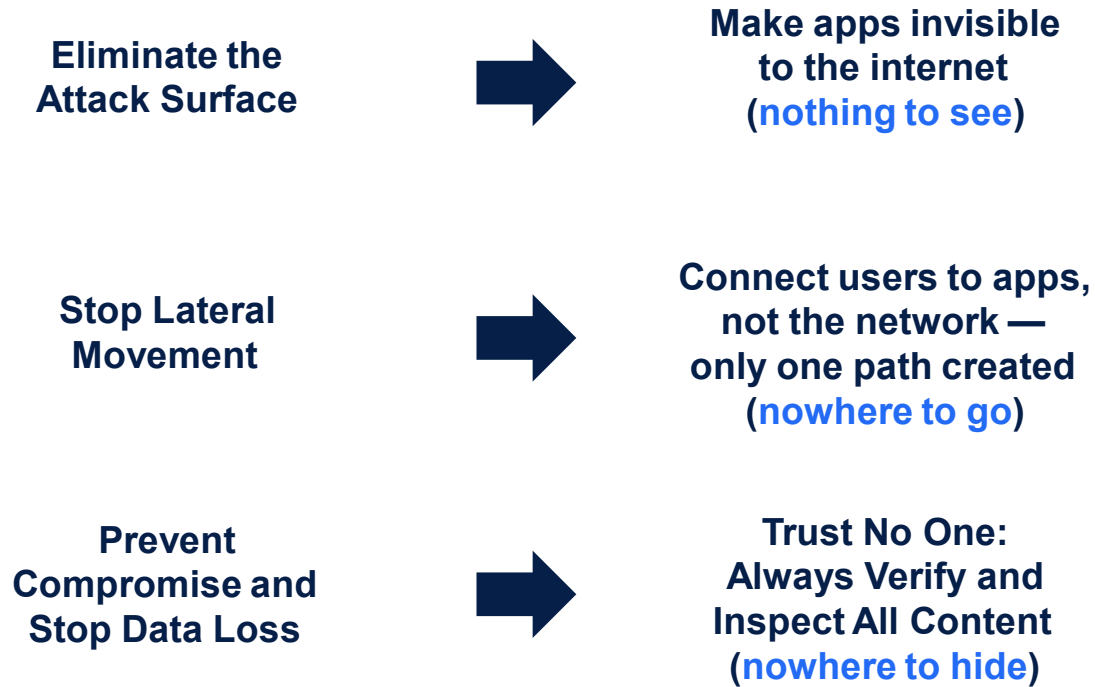
3 **They move laterally** Find high-value targets for ransomware or other attacks

Perimeter-based firewalls/VPN based security exploited by attackers and is not relevant for the cloud and mobile world

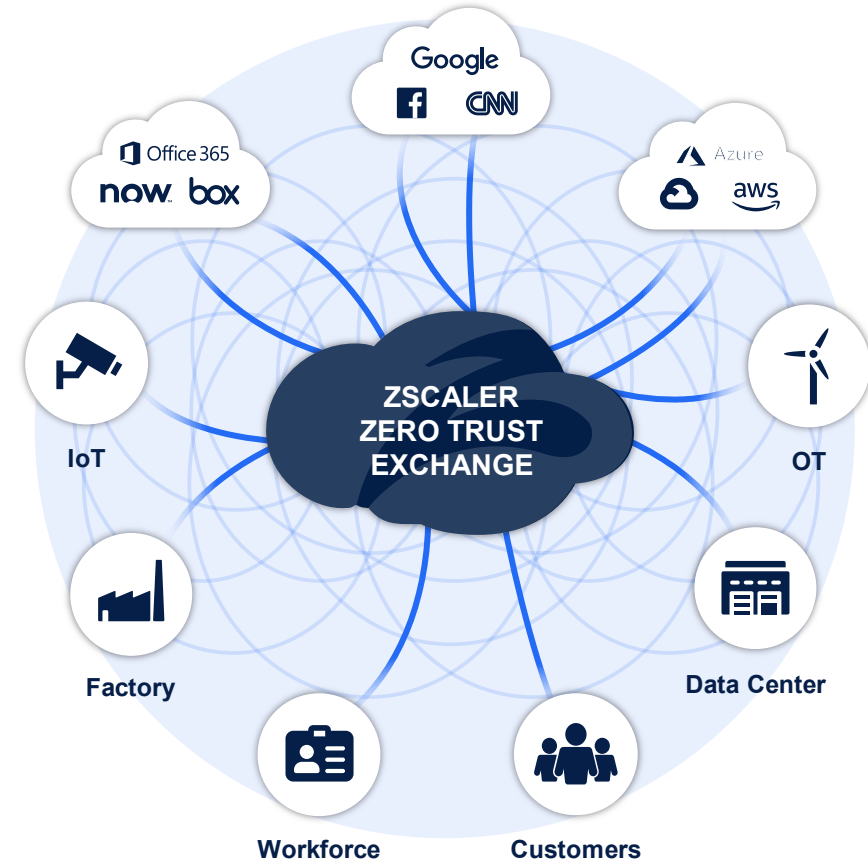
# Zscaler is transforming security

Securely connects users, devices, and apps using business policies over any network

## Zero Trust is needed to defend the cloud-first enterprise

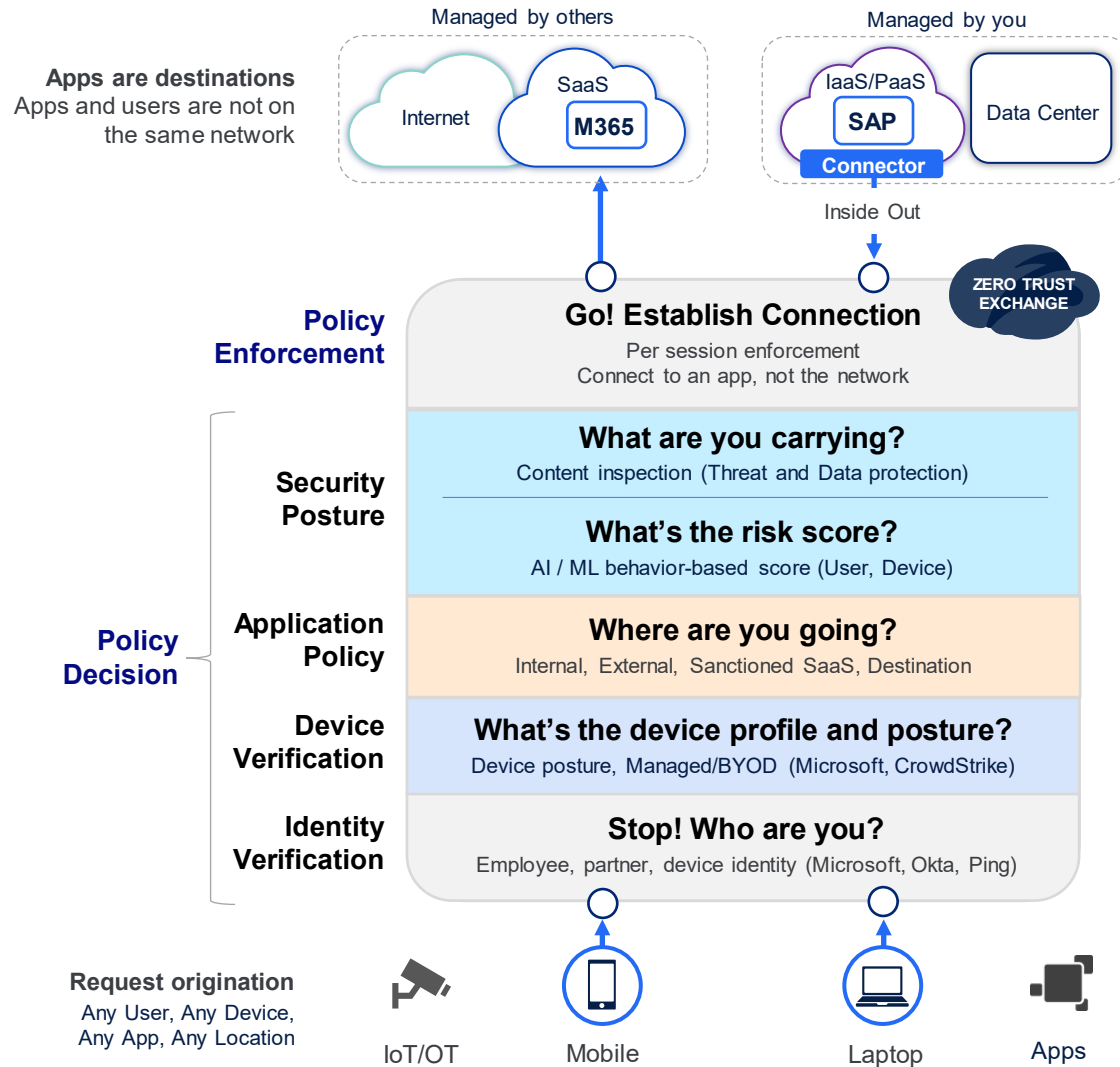


## Zero Trust exchange Any-to-any connectivity



# Zscaler Zero Trust exchange architecture

Per session policy decision and enforcement across 150 DCs worldwide



## Comparing Zero Trust with a network firewall architecture

	Zero Trust	Firewalls/VPN
<b>Eliminate Attack Surface</b> <ul style="list-style-type: none"><li>No inbound connections</li><li>Apps are invisible from the Internet</li></ul>		
<b>Prevent Lateral Movement</b> <ul style="list-style-type: none"><li>User is not on the network; the network is simply transport</li></ul>		
<b>Prevent Compromise</b> <ul style="list-style-type: none"><li>Inspect content to block threats</li><li>TLS at scale</li></ul>		Limited
<b>Prevent Data Loss</b> <ul style="list-style-type: none"><li>Inline inspection to prevent data loss</li></ul>		Limited

You can't do Zero Trust Security with Firewalls/VPN

# Zero Trust for users and workloads — hybrid and multi-cloud environments

## Secure Access to Internet / SaaS (ZIA)

### Cyber Threat Protection

Full inline content inspection (SSL at scale)  
AI-driven threat protection

### Data Protection

Inline DLP  
Inline and Out-of-Band CASB (API)

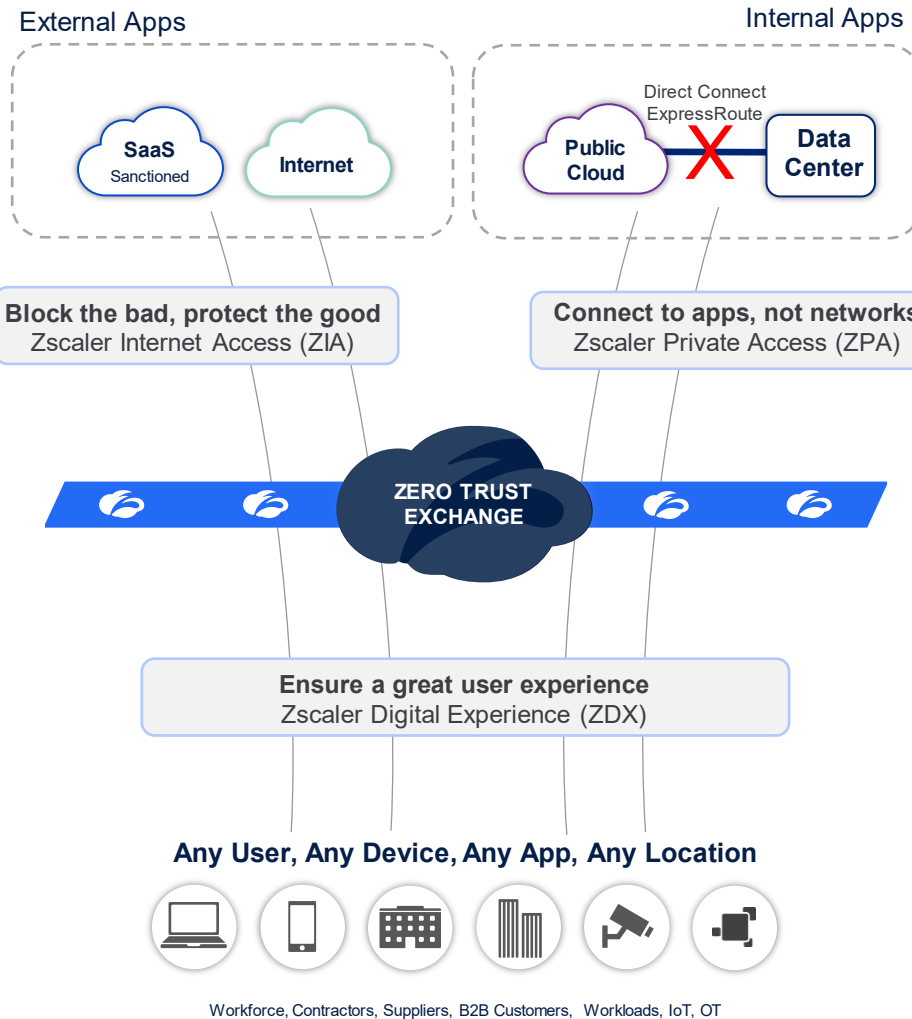
### Local Internet Breakouts

Microsoft 365  
SD-WAN

Eliminates SWG appliances  
and virtual firewalls



Firewall / IPS  
URL filter  
Anti-virus  
Data loss prevention  
SSL inspection  
Sandbox



## Secure Access to Private Apps (ZPA)

### Remote App Access without VPN

Workforce and 3<sup>rd</sup> party contractors, suppliers  
Secure Access to industrial Systems

### Direct App Access

Hybrid and multi-cloud environments  
No DC to cloud, cloud to cloud VPNs

### Accelerate M&A IT integrations

Enable app access without merging networks

Eliminates VPN infrastructure  
and virtual firewalls



Global load balancing  
DDOS protection  
External firewall / IPS  
Internal load balancer  
VPN concentrator  
Internal firewall

# Zscaler Zero Trust platform offerings

Comprehensive and integrated Zero Trust platform enables security and network transformation

## Modern workplace enablement

Productive Collaboration Experience  
Any User, Any Device, Any Location

## Security transformation

Castle and Moat to Zero Trust  
Cyber Threat and Data Protection

## Infrastructure modernization

Hub-and-Spoke to Zero Trust Connectivity  
for Branch, Factory and Cloud

### API

Secure Data at Rest  
(Scanning Mode)

### Secure SaaS Data (CASB)

Posture, Visibility, Threat and Data Protection

### Secure Public Cloud (CNAPP)

Attack Surface, Config/Entitlement, Runtime Protection

### Inline

Securely connect  
users, workloads  
and devices  
(Real-time Mode)

### Zero Trust for users

Secure app and  
internet access

### Zero Trust for workloads

Secure workload to workload  
and internet communications

### Zero Trust for IoT/OT

Secure IoT/OT app and  
internet access

*Powered by ZIA and ZPA*

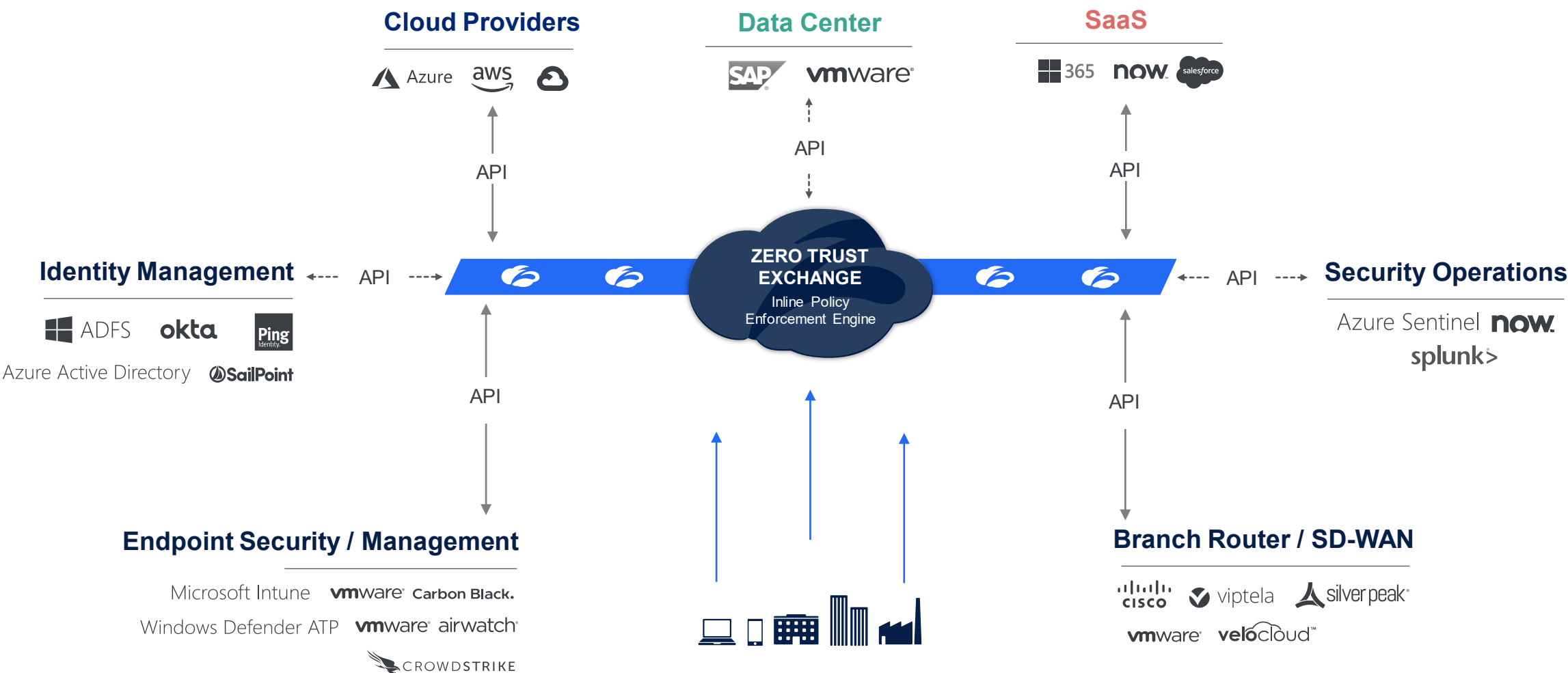
## Zero Trust Exchange Platform

Cloud-Native, Multi-tenant, Global



# Ecosystem of best-of-breed platforms

Platforms eliminate point solutions and allow for vendor consolidation



Zscaler reduces cost and operational complexity

# Secular tailwinds powering adoption

**Internet / SaaS**  
**Office 365**

Secure & fast access

**Direct-to-Cloud**  
**Network Transformation**

Secures local breakouts that SD-WAN provides

**Work from**  
**Anywhere**

Fast and secure access to applications

**IaaS/ Public Cloud**  
**(Azure / AWS)**

Secure cloud workload, app-to-app communication

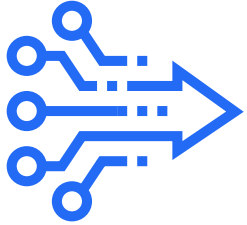
**IoT/OT**

Bring zero-trust to IoT/OT

**5G**

Enabling safe edge computing

# Our competitive advantages



**Comprehensive  
and Integrated  
Platform at Scale**



**Focused Innovation &  
Extensible Platform**



**Multi-Tenant  
Security Cloud –  
Growing Data,  
Insights & AI/ML**



**Growing Tech  
Partner Ecosystem**



**World Class  
Go-to-Market &  
Growing Channel**

Operational excellence

# Global footprint delivers better security & user experience

**150+**  
Data Centers

**250B**  
Transactions / Day

**7B+**  
Enforcements / Day

**200K+**  
Security Updates / Day

**Availability SLA 99.999%**  
**100% Renewable Energy**  
**Proven Elasticity & Scale**

**Security Hardened**  
**Operational Compliance**



\*Map shows major cities where Zscaler has data center. This map does not show a comprehensive list of Zscaler's total global footprint of over 150 data center locations.

# THE EXECUTION LEADER

## 2022 Gartner MQ for security service edge

- ▶ Highest ability to execute and 11 consecutive years of Gartner Leadership
- ▶ Largest and most proven Security Cloud for SWG, CASB and ZTNA
- ▶ Zscaler Zero Trust Exchange accelerates secure digital transformation

Figure 1: Magic Quadrant for Security Service Edge



Source: Gartner (February 2022)

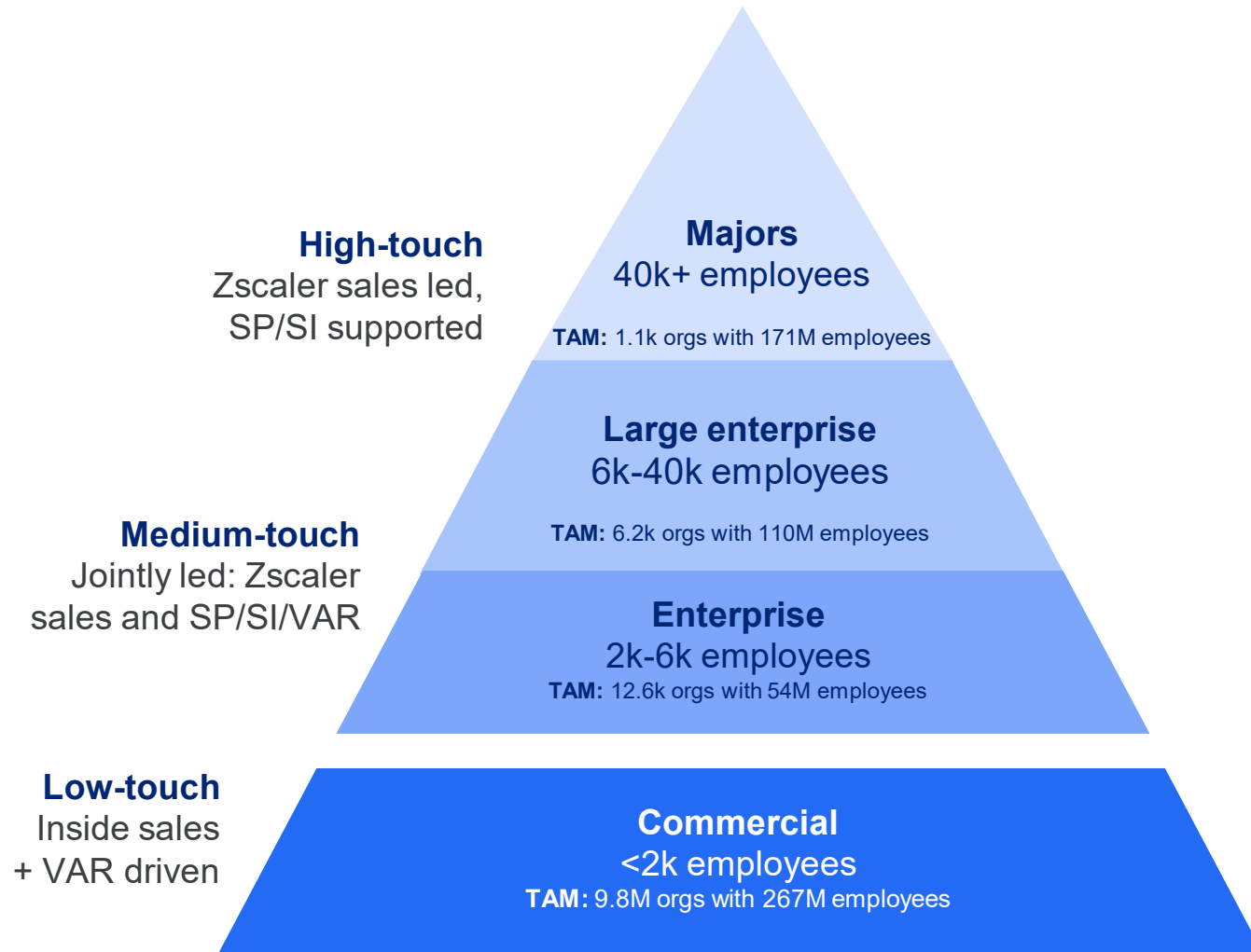
# Enabling digital transformation requires a unique sales process



**Driving Value  
Through Lifecycle  
Engagement With  
Customers**



# Scaling with majors & large enterprises, while expanding to smaller enterprises



Targeted account-based sale with focus on enterprises

## Winning with majors & large enterprises

### Expanding to enterprise segment

#### New investment:

- Specific marketing program dollars towards <6k employee companies.
- Specific Strategy & Enablement programs/playbooks for this segment

#### Attractive market segment:

- Expands TAM significantly
- Shorter sales cycle
- Leverage: Channel plays a bigger role in the segment

### Exploring opportunities in commercial:

via Distribution/MSP models, which are zero to low touch

- Partners asking for our help to service this market

Total Addressable Market (TAM) for Majors, Large enterprise, Enterprise and Commercial segments are based on data from ZoomInfo for total Global Parent Companies and their Total Employees, rounded to nearest digit, as of December 23, 2020.



# Financial overview

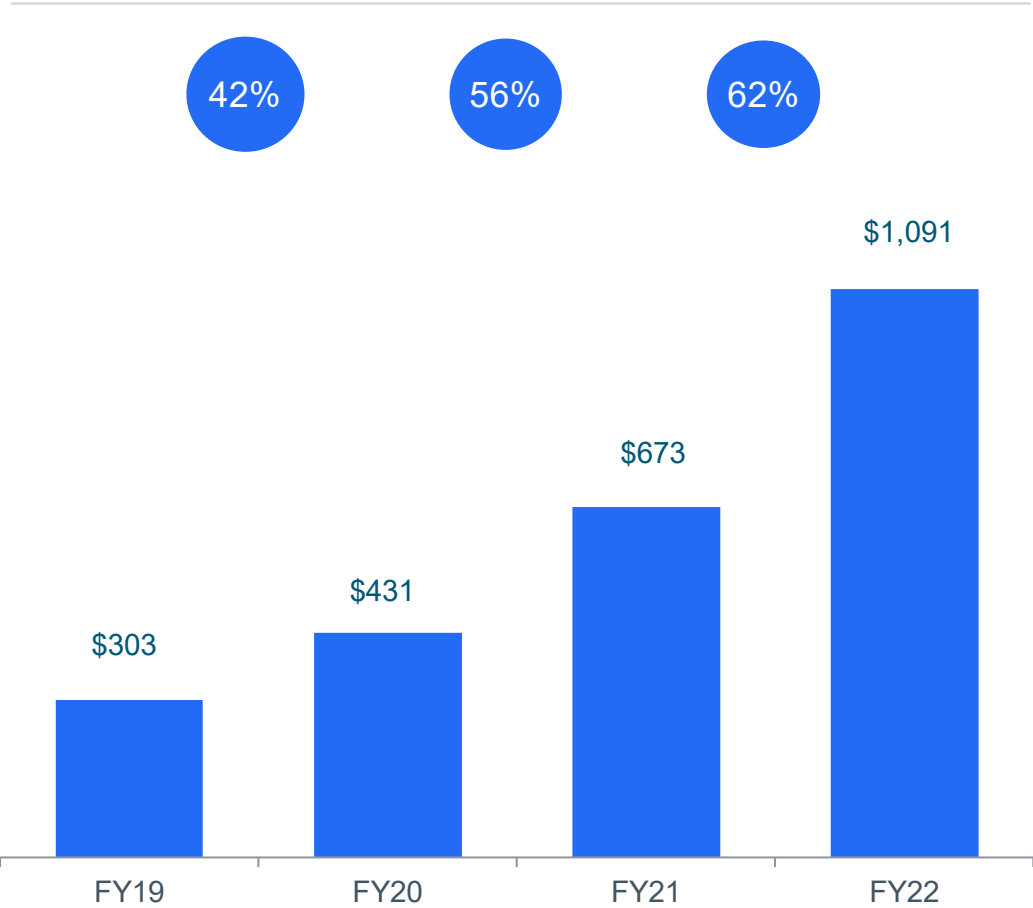
Remo Canessa — Chief Financial Officer



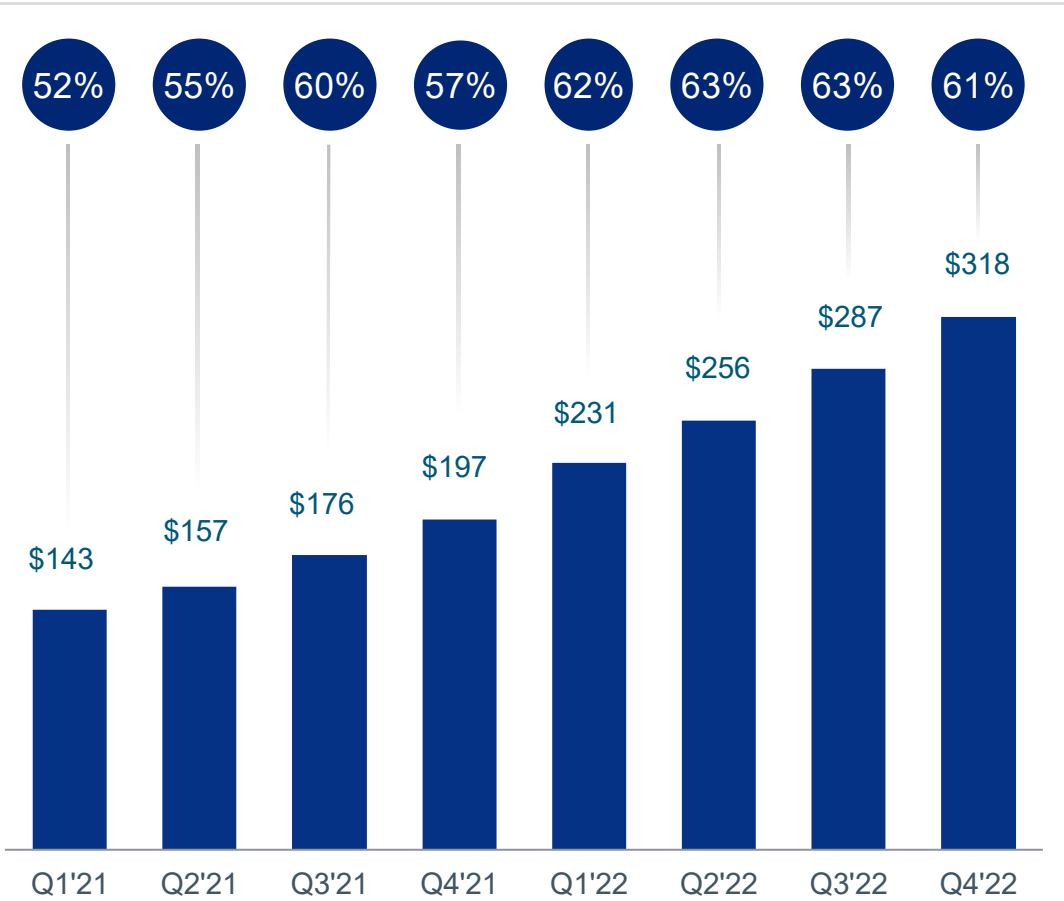
# Consistent and strong revenue growth

(\$ in millions)

Annual revenue / YoY growth



Quarterly revenue / YoY growth



Note: Fiscal year ended July 31.

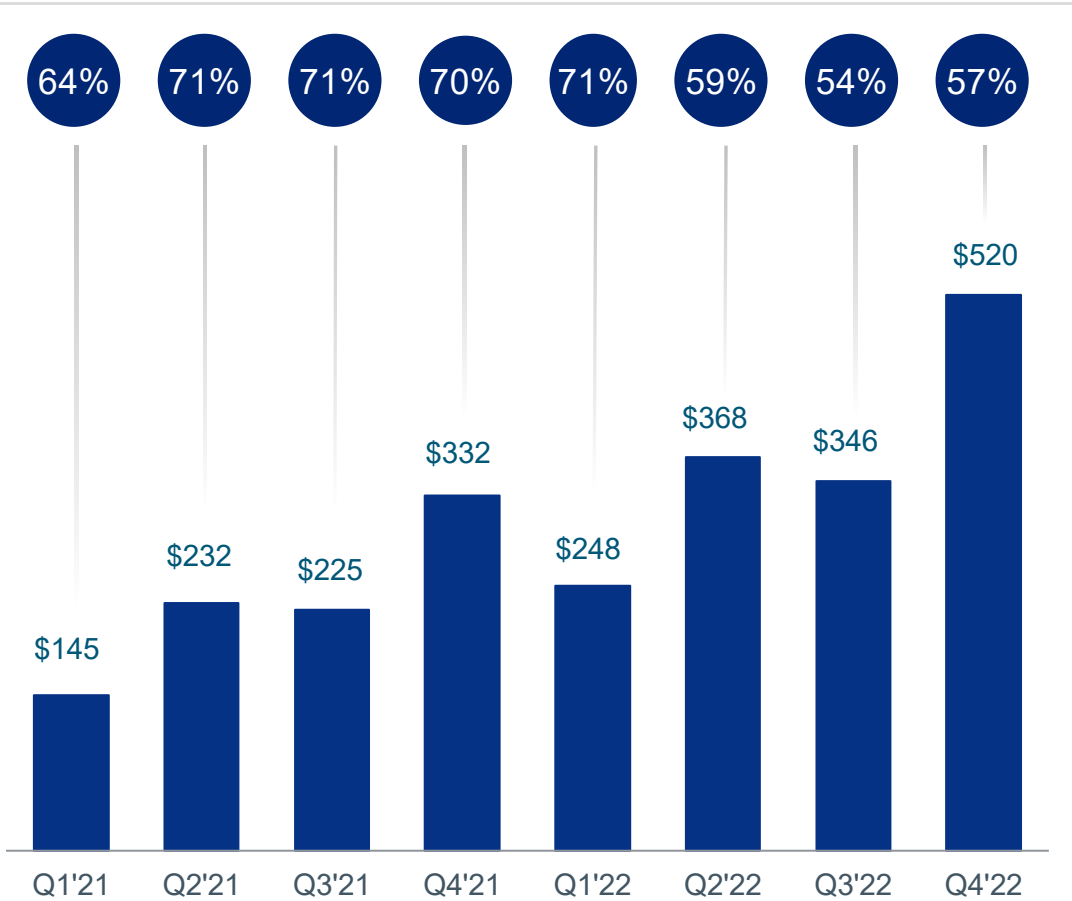
# Strong YoY growth in calculated billings

(\$ in millions)

Annual billings / growth

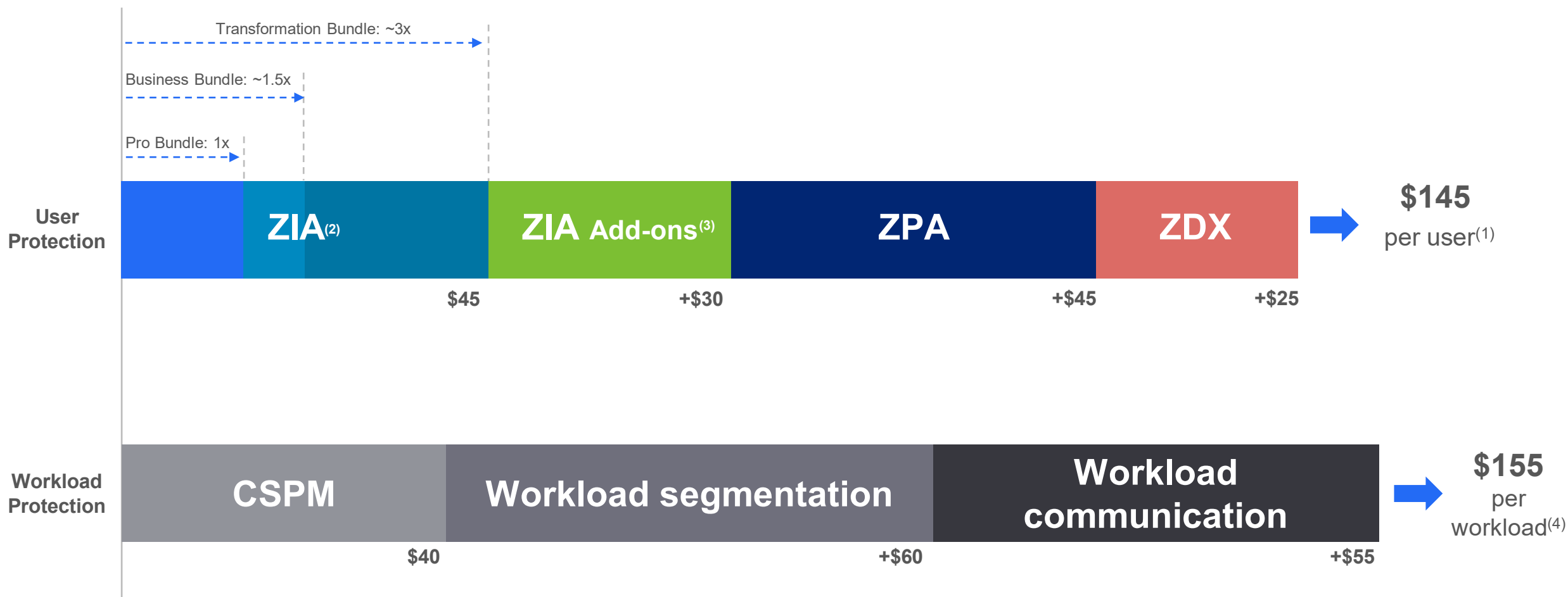


Quarterly billings / YoY growth



Note: Fiscal year ended July 31.

# Annual pricing model provides significant expansion opportunities



1) Per user pricing for individual products is effective annual prices to Zscaler for customers of 5,000 seats (also referred to as ARPU, or average revenue per user), except for new products including API CASB, Browser Isolation and ZDX, where we calculate ARPU based on closed deals with high volume purchases.

2) ZIA Professional Bundle includes Secure Web Gateway. Business Bundle includes all Professional Bundle functionality, plus SSL inspection, Advanced Threat Protection, inline Cloud Application Control, Bandwidth Control, and more. Transformation Bundle includes all Business Bundle functionality, plus Cloud Sandbox and Cloud Firewall.

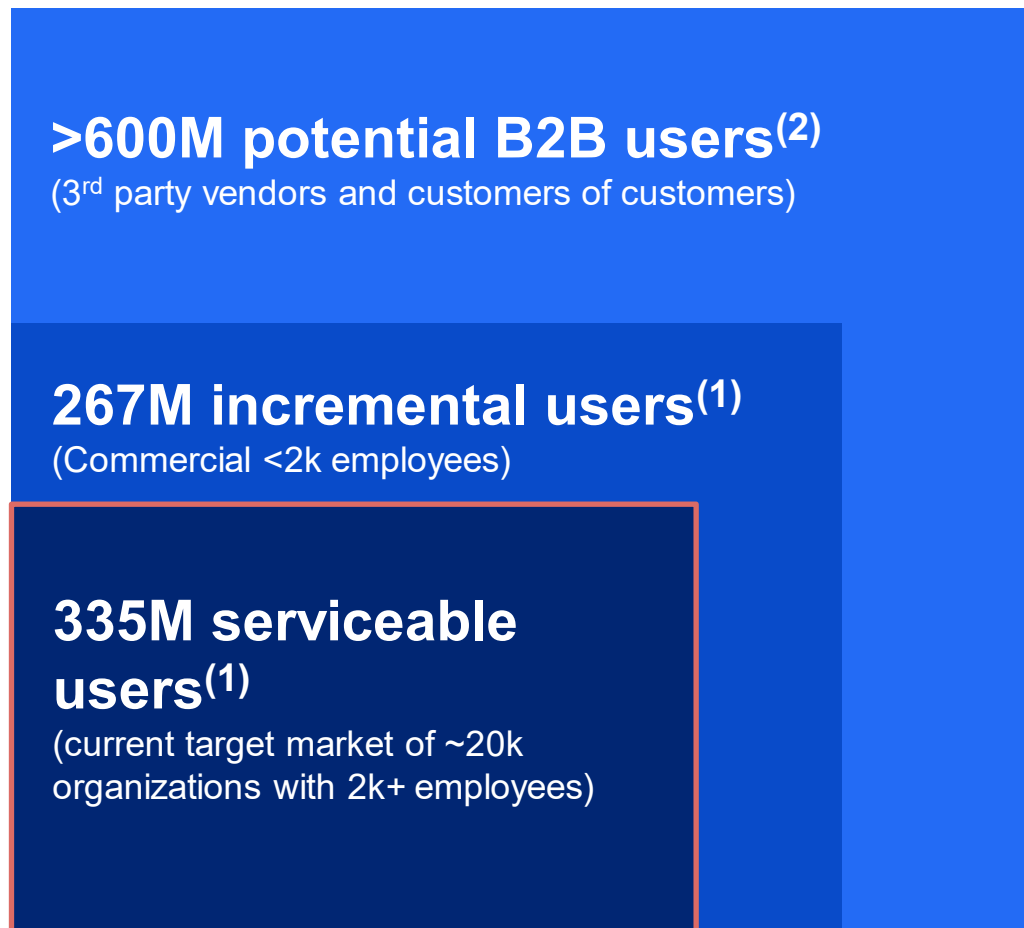
3) ZIA Add-ons include Data Loss Prevention, Exact Data Match, API CASB and Browser Isolation.

4) Per workload pricing applies to Zscaler Cloud Protection (ZCP) products, including CSPM, Workload Segmentation and Workload Communication.

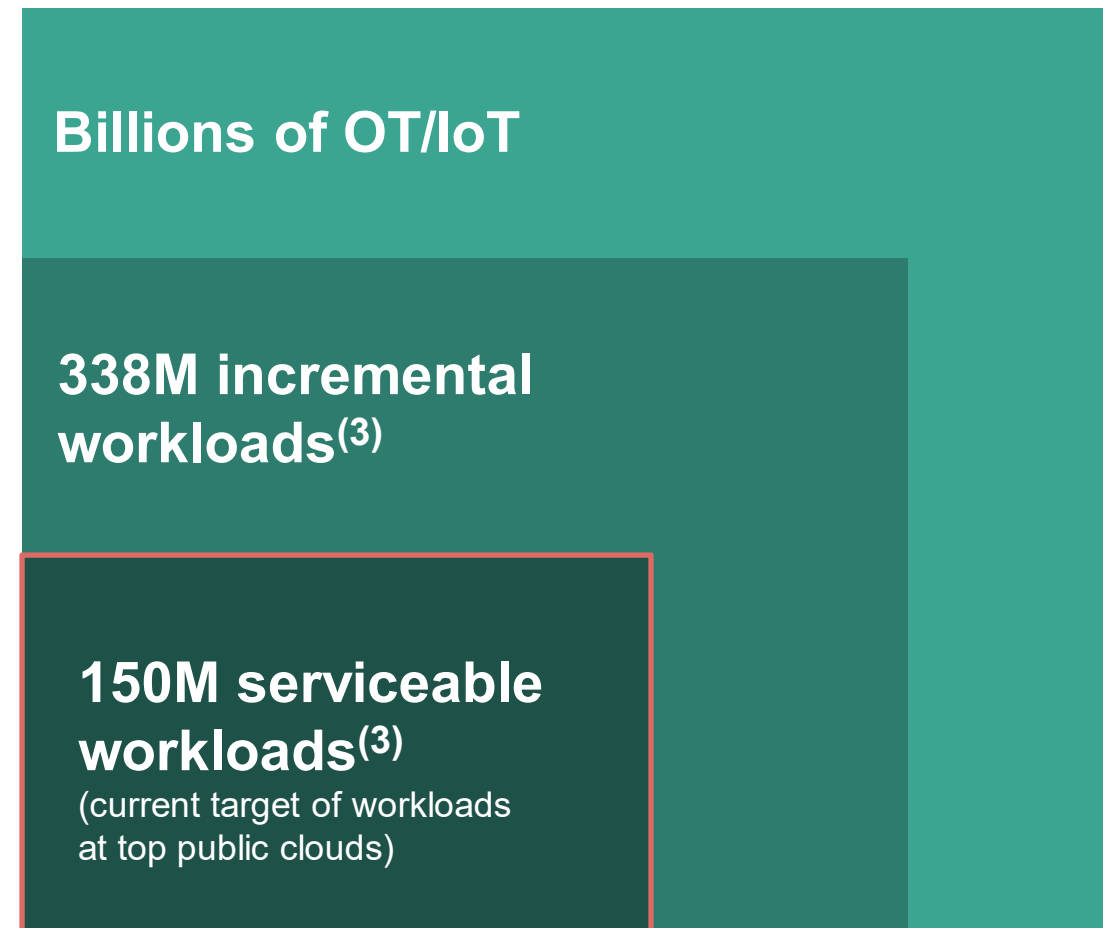
As ZCP products have been available for a short period of time, pricing per workload is effective annual prices to Zscaler in closed deals with high volume purchases, as well as Zscaler's estimate for current deals in progress.

# Serviceable users of 335M and serviceable workloads of 150M

## Users



## Workloads & OT/IOT devices



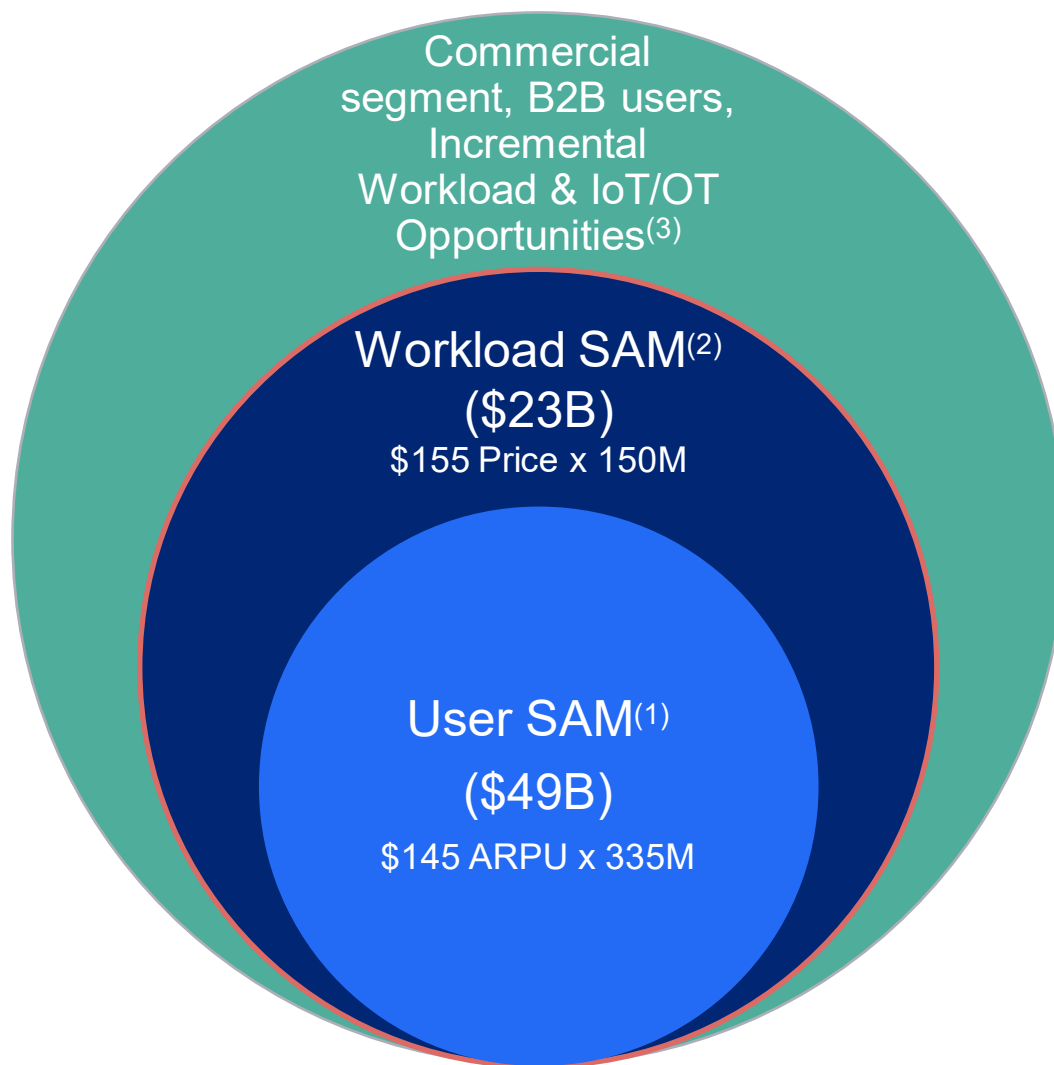
1) Based on Zscaler's analysis of worldwide organization and employee data from ZoomInfo.

2) Zscaler's estimate of potential B2B Users is based on assuming a similar number of users as total worldwide workforce. We consider B2B users to include third-party vendors and customers of our customer.

3) Based on Zscaler's analysis of workload market forecast for 2020 from 650 Research.



# Serviceable market of \$72 billion, plus bigger long-term opportunity



Our \$72 billion core serviceable opportunity, comprised of:

- \$49 billion user SAM focused on enterprises with 2k+ employees
- \$23 billion workload SAM for workloads in top public clouds

1) User SAM is based on Zscaler's analysis of ZoomInfo worldwide workforce data for organizations with 2k+ employees, multiplied by Zscaler's aggregate average revenue per user (ARPU) of approximately \$45 for ZIA Transformation bundle, \$30 for ZIA add-ons, \$45 for ZPA and \$25 for ZDX from customers purchasing 5,000 seats.

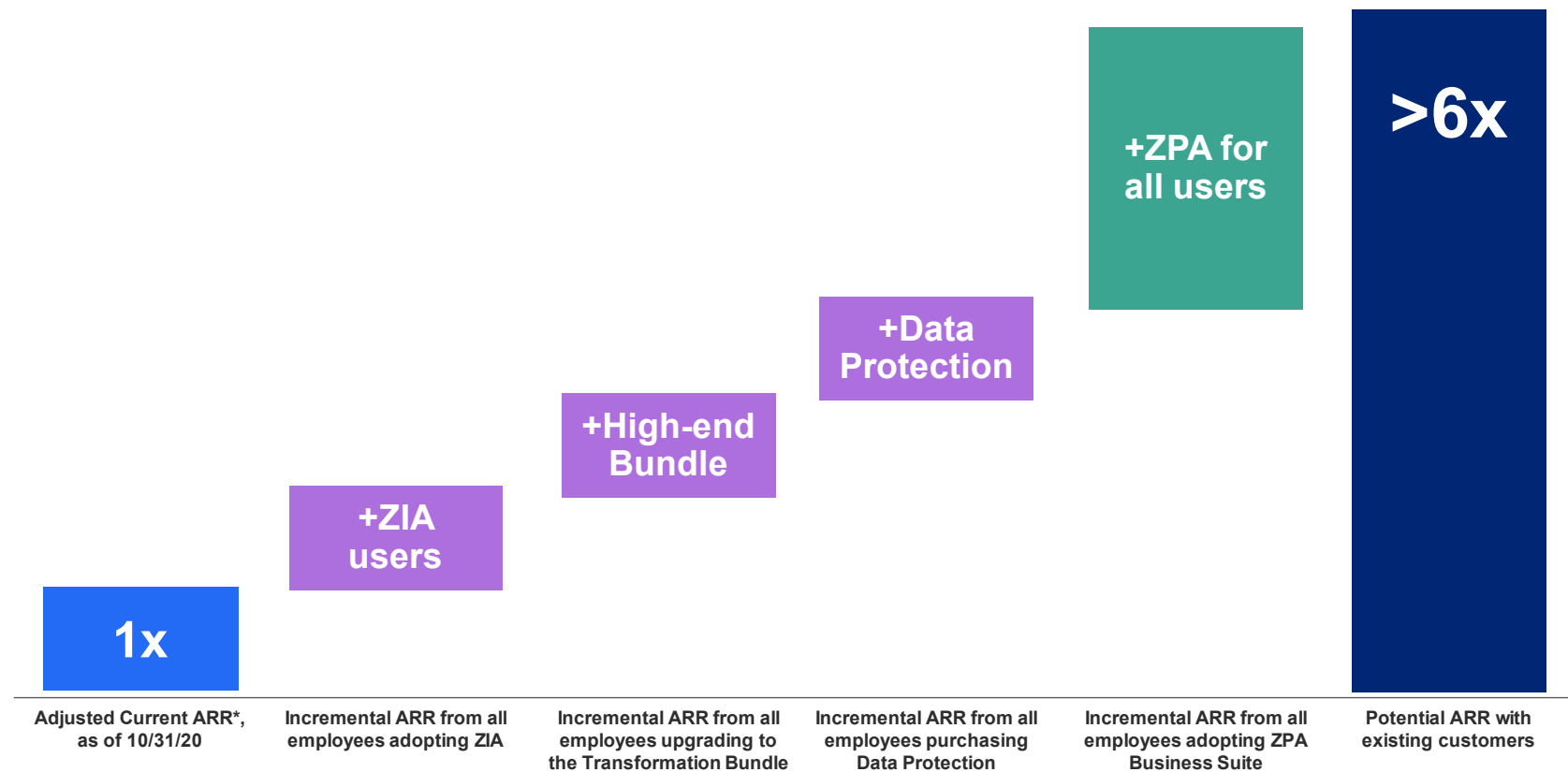
2) Workload SAM is based on Zscaler's analysis of 650 Research's workload market forecast for 2020, multiplied by Zscaler's aggregate average revenue per workload of approximately \$40 for CSPM, \$60 for Workload segmentation and \$55 for Workload Communication solutions in the ZCP family.

3) Additional future opportunity available in securing the worldwide workforce of commercial businesses with <2k employees, users of B2B third-parties and customers of customers, Incremental workloads in hybrid/private cloud and other environments, and number of connected OT/IOT devices.

# >6x

## Upsell opportunity

on ZIA and ZPA alone  
with existing customers\*



\*Upsell opportunity analysis based on Annual Recurring Revenue (ARR) of customers with 100 ZIA seats or more, as of Q1'21 ending October 31, 2020; this process eliminates paid trials and other smaller deployments, which if included would increase upsell potential further. Our analysis also excludes OEM agreements and end customers with deals primarily based on traffic/usage. Including all adjustments as noted, Adjusted ARR represents over 95% of Total ARR.

We calculate total Upsell Opportunity as total incremental ARR from selling additional seats to cover total employees and additional ZIA and ZPA product functionality at their existing subscription prices, and then applying an incremental discount of 35% on the upsell. Our analysis excludes newly introduced products, including ZB2B, API CASB, Browser Isolation, ZDX and ZCP.

We determine *Incremental ARR* by calculating the potential value of: 1) additional ZIA seat subscriptions for customers that have purchased ZIA for none or for a subset of total employees, assuming purchase of equivalent product functionality/bundles as existing ZIA subscription, or ZIA Transformation Bundle where no prior ZIA subscription was purchased, for remaining employees, 2) additional product functionality in high-end Transformation Bundle, where customers purchased Professional or Business Bundles, 3) add-on subscriptions for Data Protection products, including DLP and Exact Data Match, and 4) additional ZPA seat subscription for customers that have purchased ZPA for none or for a subset of total employees, assuming purchase of equivalent product functionality/bundles as existing ZPA subscription, or ZPA Business Suite where no prior ZPA subscription was purchased, for remaining employees.

Total employee count for existing customers is Zscaler internal data based on various sources including customer-supplied information, public filings with SEC, Hoover's, Dun & Bradstreet, Discover.org and ZoomInfo.

# Significant international revenue

Historically, approximately 50% of our revenue has come from outside Americas

## Early big wins in Europe

Continued investment after early success with G2000 customers including Siemens and Schneider Electric

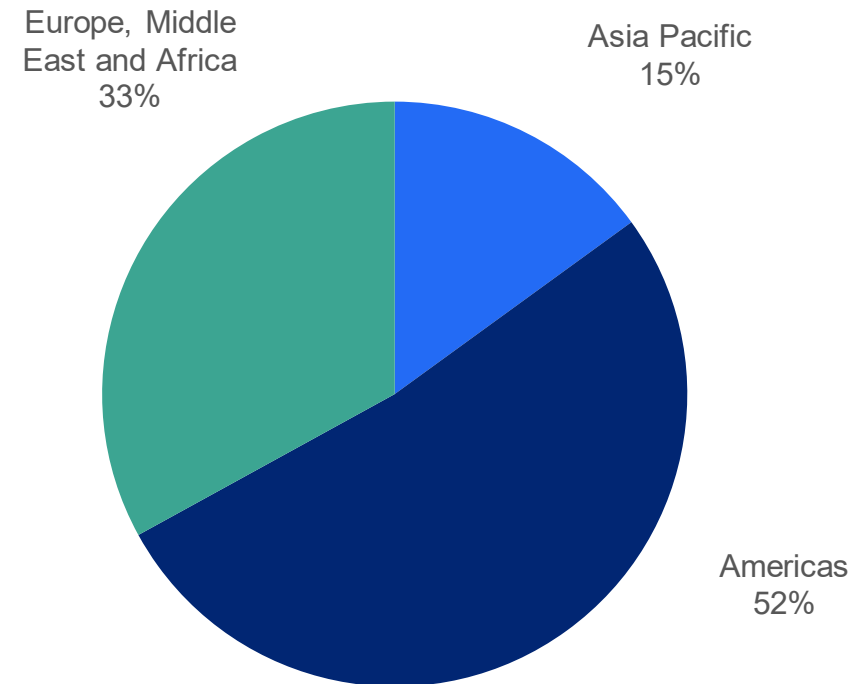
## Early investment in international sales

Replicated size of U.S. sales team internationally

## Global SP partners

Focused on partnering with global service providers including BT, OBS, others to efficiently expand our reach

## Revenue by geography



Based on Q4'22 revenue

# Attractive cloud gross margins

## Purpose-built, multi-tenant architecture

Each subsystem optimized for high throughput, reducing the number of servers needed

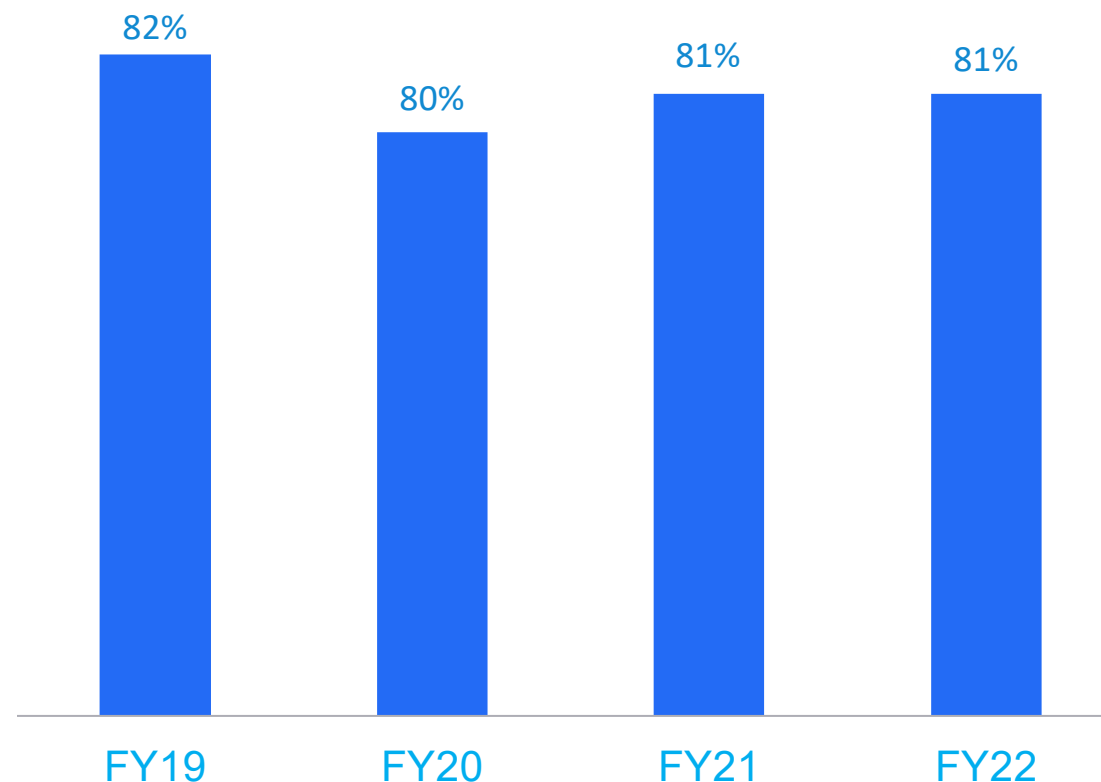
## Cloud operations

Highly automated, which requires lower head count to operate the cloud

## Peering with content and service providers at internet exchanges

Reduces bandwidth cost

## Non-GAAP gross margin<sup>(1)</sup>

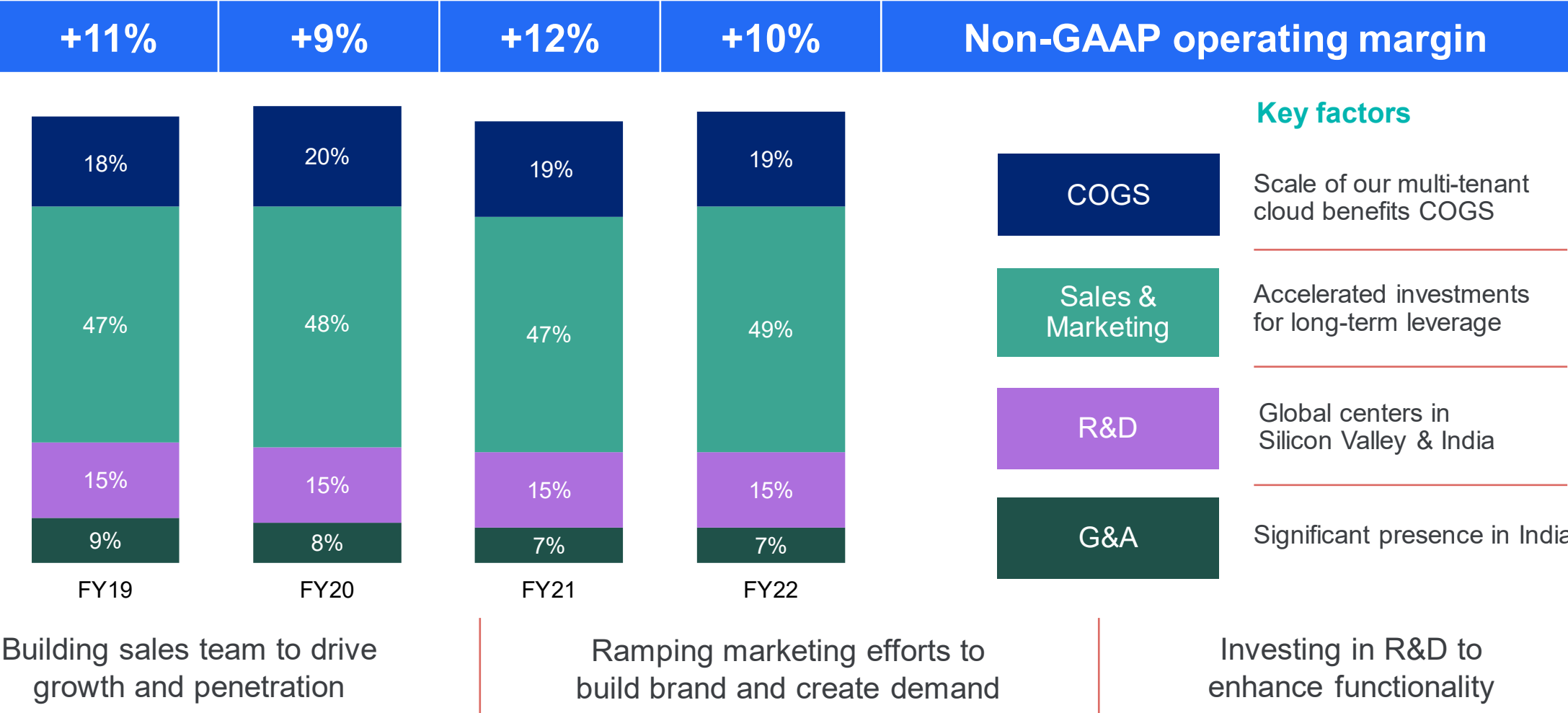


**Note:** Financials presented are non-GAAP; refer to the non-GAAP to GAAP reconciliation in Appendix.

1) Non-GAAP gross margin is defined as GAAP gross margin, excluding stock-based compensation expense and related payroll taxes and amortization expense of acquired intangible assets.

# Investing for growth to capture large opportunity

Non-GAAP expenses <sup>(1)</sup> and non-GAAP operating margin <sup>(1)</sup> as % of revenue



1) Non-GAAP expenses exclude stock-based compensation expenses and related payroll taxes, amortization expense of acquired intangible assets, asset impairment related to facility exits, amortization of debt discount and issuance costs and certain litigation-related expenses. Refer to the GAAP to non-GAAP reconciliation in Appendix A.

# Financial Appendix



# Explanation of Non-GAAP Financial Measures

In addition to our results determined in accordance with generally accepted accounting principles in the United States of America (“GAAP”), we believe that the presentation of non-GAAP financial information provides important supplemental information to management and investors regarding financial and business trends relating to our financial condition and results of operations. However, non-GAAP financial information is presented for supplemental informational purposes only and should not be considered in isolation or as a substitute for financial information presented in accordance with GAAP. Investors are cautioned that there are a number of limitations associated with the use of non-GAAP financial measures and key metrics as analytical tools. Investors are encouraged to review these reconciliations, and not to rely on any single financial measure to evaluate our business.

## ***Expenses Excluded from Non-GAAP Measures***

Stock-based compensation expense is excluded primarily because it is a non-cash expense that management believes is not reflective of our ongoing operational performance. Employer payroll taxes related to stock-based compensation, which is a cash expense, are excluded because these are tied to the timing and size of the exercise or vesting of the underlying equity awards and the price of our common stock at the time of vesting or exercise, which may vary from period to period independent of the operating performance of our business. Amortization expense of intangible assets acquired in business acquisitions and related income tax effects, if applicable, are excluded because these are considered by management to be outside of our core business operating performance. Asset impairments related to facility exit costs are excluded because such charges are not reflective of our ongoing operational performance. Amortization of debt discount and issuance costs from our convertible senior notes are excluded because these are non-cash expenses and are not reflective of our ongoing operational performance. We estimate the tax effect of these items on our non-GAAP results and may adjust our GAAP provision for income taxes, if such effects have a material impact to our non-GAAP results.

## ***Key Non-GAAP Financial Measures Included within this Presentation:***

- Non-GAAP Gross Profit and Non-GAAP Gross Margin (\*)
- Non-GAAP Income from Operations and Non-GAAP Operating Margin (\*)
- Free Cash Flow and Free Cash Flow Margin (\*)

(\*) Non-GAAP to GAAP reconciliations shown on the following slides.

# Appendix A: Non-GAAP to GAAP Reconciliation

(\$ in thousands)

	FY'21						FY'22					
	Non-GAAP	Stock-based compensation expense and related payroll taxes	Amortization expense of acquired intangible assets	Asset impairment related to facility exit	Amortization of debt discount and issuance costs	GAAP	Non-GAAP	Stock-based compensation expense and related payroll taxes	Amortization expense of acquired intangible assets	Amortization of debt discount and issuance costs	Benefit for income taxes	GAAP
Revenue	\$673,100					\$ 673,100	\$1,090,946					\$1,090,946
YOY growth	56 %					56 %	62 %					62 %
Cost of revenue	128,577	\$ 15,272	\$ 6,468			150,317	209,015	\$ 25,292	\$ 7,975			242,282
Gross profit	544,523	(15,272)	(6,468)			522,783	881,931	(25,292)	(7,975)			848,664
Gross margin	81 %					78 %	81 %					78 %
Sales and marketing	314,807	144,273	327			459,407	532,304	202,211	704			735,219
% of revenue	47 %					68 %	49 %					67 %
Research and development	101,415	73,238				174,653	165,386	123,422	331			289,139
% of revenue	15 %					26 %	15 %					27 %
General and administrative	50,340	45,779		416		96,535	72,640	79,095				151,735
% of revenue	7 %					14 %	7 %					14 %
Total operating expenses	466,562	263,290	327	416		730,595	770,330	404,728	1,035			1,176,093
% of revenue	69 %					109 %	71 %					108 %
Income (loss) from operations	77,961	(278,562)	(6,795)	(416)		(207,812)	111,601	(430,020)	(9,010)			(327,429)
Operating margin	12 %					(31)%	10 %					(30)%
Interest income	2,812					2,812	4,586					4,586
Interest expense	(1,441)				\$ (51,923)	(53,364)	(1,438)			\$ (55,141)		(56,579)
Other income (expense), net	1,186					1,186	(4,208)					(4,208)
Provision (benefit) for income taxes	(4,851)					(4,851)	(9,245)				\$ 2,597	(6,648)
Net income (loss)	\$ 75,667	\$ (278,562)	\$ (6,795)	\$ (416)	\$ (51,923)	\$ (262,029)	\$ 101,296	\$ (430,020)	\$ (9,010)	\$ (55,141)	\$ 2,597	\$(390,278)

# Appendix A: Non-GAAP to GAAP Reconciliation

(\$ in thousands)

	FY'21	FY'22
Free cash flow	\$ 143,743	\$ 231,332
Revenue	673,100	1,090,946
Free cash flow margin	21 %	21 %

Net cash provided by operating activities	\$ 202,040	\$ 321,912
Less: Purchases of property, equipment and other assets	(48,165)	(69,296)
Less: Capitalized internal-use software costs	(10,132)	(21,284)
Free cash flow	\$ 143,743	\$ 231,332
Net cash provided by operating activities, as a percentage of revenue	30 %	30 %
Less: Purchases of property, equipment and other assets, as a percentage of revenue	(7)%	(7)%
Less: Capitalized internal-use software costs, as a percentage of revenue	(2)%	(2)%
Free cash flow margin	21 %	21 %

# Appendix

## Comparing connecting users to networks versus users to apps with Zscaler

**Zero Trust access is like escorting a visitor to a meeting and then out. Plus hide your building (apps).**



# User experience challenges in a cloud & mobile first world

