



Steven Dickens: Hello and welcome back to day two of The Six Five Summit. In this spotlight session, I'm going to be talking with Andrew Davidson, SVP of Products from MongoDB about the changes that we're seeing in the software ecosystem. Welcome to The Six Five Summit, Andrew.

Andrew Davidson: Great to be here, Steven, and good to see everybody today.

Steven Dickens: So, this is going to be an interesting conversation. I think there's lots going on in the market right now. There's been lots of changes since MongoDB entered the industry, but the one that's kind of capturing the sort of zeitgeist and the headlines right now is obviously AI. What's really been the sort of strategy, where's kind of position Mongo, if you will, in that context?

Andrew Davidson: Yeah, it really isn't an exciting time. I might even come out and say in a way this moment that we've all been waiting for in particular, we at MongoDB in many ways kind of think of ourselves as really tapped into the zeitgeist of developers. Our strategy from the very beginning has been anchored on developer productivity and everything we've been doing over time is about unlocking the possibility for developers wherever the industry context was. In the early days of cloud, it was about a distributed system with a document interface, basically a developer oriented data model, and then the rise of mobile, the rise of mission criticality for enterprises being able to deliver for the first time those consumer grade experiences and more.

And as you kind of keep pushing forward, what you realize is what's happening is there's this idea that everything keeps shifting left into the developer column, that developers who are in many ways crafting the digital economy. In fact, I would argue we are in a software defined economy, which is therefore a developer defined economy. We're in this moment in which giving those developers the ability to build more effectively, more in interesting software, more enriched application experiences to be able to do faster to do more with less. This is allowing more software to be created in all contexts from startups to enterprises. And so, I see in many ways this kind of light bulb moment around AI, generative AI in particular as kind of this, okay, we've been waiting for this moment of machine learning and artificial intelligence to finally shift left into the developer column and I think that moment is here now.

And so, there's this very exciting Cambrian explosion of ways now to build new kind of applications, new frameworks and stacks and we all know that this is going to take time to stabilize, to be enterprise ready, but we see this as highly synergistic with what we do as a developer data platform, really enabling those applications to be built. All applications require operational data, require state, it's just such a fundamental part of any software and software itself being kind of disrupted in a way, it being possible to write software more efficiently than ever before with all of these new capabilities, it's an exciting moment.

Steven Dickens: So, I think I agree a hundred percent. I think the other thing I see and we see from our conversations with lots of other vendors is that this explosion that you mentioned is happening also against a macroeconomic background where people are focused on cost optimization, FinOps. So, we'll be going through a wave of consolidation and optimization, at the same time we're seeing some of the things that you just mentioned.

Andrew Davidson: On the one hand, the industry's so excited to have this new thing going on because you could feel that fast moving water coming back into the industry, at a time in which it's been a



challenge for so many of us focusing on optimization. I'll say that certainly the way we've been thinking about the strategy before the consolidation and optimization mindset even set in, but it was well-timed, is to be able to say, "Hey, I should be able to build with a developer data platform that lets me express the vast majority of the features for the vast majority of my applications, in a consistent way all through an elegant developer oriented interface." In other words, our strategy has been sort of anchored in the idea that I shouldn't have to compose by bolting together a bunch of different systems and layering in all of the ETL and data movement. I should just be able to have my developers use one platform that lets me express all of those needs.

And so, it turns out that having all of that capability in one platform in particular, I think a great example of this is what we've done with search, bringing the full power of search, almost the idea of collapsing this enormously complex search industry of all these different ways of building search into application experience is just saying "That should just be a feature or capability of a developer data platform." That's been our mindset and I think having done that in particular with search right before this consolidation optimization mindset set in has allowed a lot of our customers any way to feel that, okay, wow, if I'm going to be betting on a small number of technologies that are going to be around for a long time, mission-critical data moves slowly on multi-decade horizons in terms of standardization.

If I'm going to be making big bets on something that's a true secular shift in how I build my software applications, I want to do it on top of platforms that are going to be able to keep doing all the many things I need. And that's not a static thing. I mentioned before in the early days of cloud, it was enough to be just a document metaphor. Then you needed geospatial to for the rise of mobile, then you needed rich indexing, and application driven analytical capabilities. And now surge and of course, no doubt with generative we're going to see a whole new set of application requirements. That's what we think about in our strategy to invest in and kind of stay ahead of, so that the people who are partnering with us and frankly betting on building on our platform, they feel that they're really being able to take advantage of all that innovation that we keep pouring in.

Steven Dickens: So, there's some good points there. I think one of the other trends, people are trying to get more from less or more from more they've invested in, and I think it speaks to some of the points that you mentioned. So, if you were to be able to give advice and guidance and sort of reach beyond this discussion out to clients, how should they be thinking about how they organize and operate in order to maximize the ability to unlock the value of your software, and ultimately the other software adjacencies that sits around what you guys do?

Andrew Davidson: That's a really interesting question. We've heard I think for a long time wisdom in the industry along the lines of, Hey, you've got to make your app dev teams in the line of business, reasonably self-sufficient, give them that agility. Maybe it's a two pizza team that can build capabilities in isolation moving fast on their own to achieve their business objectives. That idea is really powerful, but I think what's changed over the last five to 10 years is the constituency of that two pizza team is increasingly pulling in people who bring a different set of skills than what was normal before. As we've been able to move away from the two pizza team needing to have lower level infrastructure, plumbing, and some of the stuff that has been abstracted away, that allows us to start over the last certainly maybe last seven years, we've started pulling in that



user experience excellence to really nail those product experiences. Like I was mentioning before, enterprise experience is at the quality bar now of consumer experiences because folks expect that today.

Well, I think what we're seeing is a new version of that with data and that's so interesting. I think we've been susceptible as an industry to having made a mistake personally where we started allowing a lot of our interesting data and insight teams and ultimately data science too, to be siloed off in a central team far removed from the line of business, far removed from the line of business application. I think there's a great opportunity right now to start shifting that and pulling that data science mindset, that really data-centric mindset into the two pizza team. This is all related to that shifting left pulling app-driven intelligence into the applications, building smarter applications, so that you can actually have the software itself express that and have that real-time business insight into what's going on in your business without it going to these separate central teams. So, I think we're going to see this trend continue where you pull more in and the only way you can do that and still keep the teams small and self-sufficient is to abstract away the things that were yesterday's or last year's or last decades' problem to worry about.

Steven Dickens: It's interesting you mentioned the two pizza team, and I'm not going to take it to a three pizza team. We've had Dev and Ops come together, we're now seeing DevSecOps come together. One of the big sort of consistent themes, especially with a fracturing geopolitical backdrop is our expectations around security and privacy. So, I think teams have been asked to secure more the edge and intelligent edge is coming into play there. We're seeing people being asked to secure more or see seem to secure against a worsening threat landscape and they're being asked to move faster. How are people keeping up?

Andrew Davidson: That's a great question as well. I mean there's this something that I think a lot about and I remember a light bulb moment for me on this topic is, its one thing to give a two pizza team the ability to move fast. That's their dream, right? They get to do their thing, move superfast, build some business need, great. But if you're at the enterprise level and you're thinking about dozens or hundreds of two pizza teams, building dozens to hundreds of software applications at the same time all over the world, all kinds of different use cases, I sometimes liken it to it's almost like if you had dozens to hundreds of your colleagues go into a Home Depot and try and build houses, it would be chaos. I mean-

Steven Dickens: I love that analogy by the way.

Andrew Davidson: Yeah, so how do you it in a way where they can still have the empowerment to do what they need to do to build the way they need to build, but to basically to not be shooting themselves in the foot and taking on enormous risk in the process.

Steven Dickens: Is that sort of templates built having the flexibility but within some guardrails?

Andrew Davidson: I think there's multiple layers to it, but there was this light bulb moment for me early on in the Atlas journey and Atlas is our flagship database service, the main revenue center for our company, MongoDB. Early on in the MongoDB Atlas journey, I had this tier one game customer



tell me, "Hey, I had an outage in a non-production environment," and I remember saying to that individual, "Well at least it wasn't an outage in a production environment." And then he goes, "No, you don't understand. This was an outage in my app dev assembly line." And that was a light bulb for me. I realized if you're operating as a software company, then what you have to build for yourself and everyone's operating as a software company today, what you have to build for yourself is your app dev assembly line, which means you're continuously moving forward your software. It was kind of like this realization that when Tesla's assembly line is down, that's a tier one business problem for Tesla and it's the same for anyone who's operating as a software company.

You have to continuously be moving forward in your software and enabling all of your software engineers to be productive basically and to keep powering forward. How do you do that while managing risk? And the only way to do that I would argue is if you have the key layers of the stack, which represent traditional centers of risk like operational data. I mean data is the center really traditionally the holy grail of the security concern. You need to make sure that that is managed in a consistent way, that is something that you can really feel confident those dozens to hundreds of teams are all going to use. They're going to use it in their own way. That's where templates can be a risk. You can't say it everyone "You're going to build the same way." There's going to be the Java developer and the Python developer and the net developer and the edge developer, and they're all going to do different things, but you need to have the key consistency in the building blocks like operational data like Atlas does.

You need to be able to manage all that declaratively with infrastructures code, change management, and I think that's why it's so important that companies like us be making these long-term bets, so that you can build on top of them and know that no matter what kind of industry or vertical or where in the world you are or what developer community you're part of, you're all able to share in the power of this platform. That's important because it means that you're betting on something that's empowering a whole community of engineers who are learning and they're going to be moving in different kinds of industries and verticals and use cases, but they're all going to have that secure baseline that's required in the platform. We thought about this early on, is there a way to... There's always been a tension between ease of use for builders and security baseline. We thought early on with Atlas, should we ever make that attention or is there a way to just make sure that all-

Steven Dickens: It's built in almost, it's built in.

Andrew Davidson: Yeah, you can't turn off all these capabilities, but you still make it easy to use. That was kind of this realization early on, if we can do that, if we can enable all these developers to build applications safely and securely, network encryption everywhere, encryption at rest everywhere, authentication everywhere, can't be disabled, then they can't shoot themselves in the foot. Sure, they're going to want to layer in all kinds of controls on top. We can't bring too much opinion in on that, but the fundamentals needed to be there. I think that was one of the key reasons why we've gotten to the point where we are now frankly, and now we keep innovating. We've got Queryable Encryption capabilities, which we launched last year, which is all about bringing in something from academia called Structured Encryption and really making that something that's real that people can start building with. That's for the most regulated



industries. So, I think this never stops but again, we're betting on this long term making big investments in it, so that our customers and partners can build on top of us.

Steven Dickens: Makes perfect sense. One of the things we mentioned, you mentioned it, I think I mentioned it in the question is around Edge. You've also talked about mobile as a kind of device centric computing platform. I think so many of apps now are built with mobile first. Where do you see that impacting how people are looking at both deployment of your technology, and sort of broader than that from an app development perspective?

Andrew Davidson: Yeah, it's really been interesting to watch this play out over the last 10 years. Clearly we've seen mobile eat software, and I would say so much of the front end experience for the software that is ultimately built on MongoDB is experienced through mobile interfaces. And that's been really exciting. But over time, what we're seeing is more and more compute is being pushed into edge context. It's not just mobile devices, think tablets and kiosks and even servers that are sitting in manufacturing contexts or on-prem factories or airports or anywhere else. You start realizing, okay, there's compute diffuse all over the world. Then there's the central hyperscaler compute where Atlas lives, and we've realized that there's definitely a world of opportunity to start focusing on unifying those two worlds, and it's a major focus certainly in our strategy. We see major uptick in retail workforce mobilization, think restaurants.

Imagine like the menu in a restaurant, being able to change the contents of the menu in real time based on the supply chain context inside of your central data operational data store in Atlas, all these types of things that people are doing as well as the ability to have those applications work locally with local latency, even when the connectivity goes down or is spotty. We're definitely being pulled in the direction of being able to express more and more of those types of use cases. It's a major focus for us in certain verticals in particular. I think not everybody's there. For a lot of folks, traditional mobile kind of simple application's fine, but once you have these data intensive use cases in edge context, there's a lot going on and I spent a lot of time thinking about it.

Steven Dickens: Yeah, probably bringing us home here. Final question, we've spent at least 10 minutes and haven't mentioned AI. This is going to air the first week of June. Obviously we've got to mention AI again, everyone's talking about it. What's your thoughts on the topic? Where's your excitement coming from and where do you see that impacting the software ecosystem?

Andrew Davidson: Yeah, there's a couple parts of this for me. The first is, I was mentioning before that I do think we've been guilty of what I sometimes refer to as the siloing of or almost ivory tower model of central data science machine learning teams far removed from the line of business. And I think that that's finally starting to change. There's a light bulb moment that I need to bring that into the line of business software application team. That's a first big realization. Another big thing for me that's related is there's an old adage in the machine learning world or phrase called Ground Truth. And if you've ever heard this phrase Ground Truth, it kind of refers to the idea that everything that we understand digitally needs to be baselined with what's going on in the real world. And that's what we refer to as Ground Truth.

And I bring that up because if you think about what operational data, which is what we do is, it's very much about being data that software can land Ground Truth into. I might even say that



software itself is kind of like a bridge or a portal between the real world and the digital understanding of the world. And operational data again is where software's landing that in. And so, we think that it's an extremely exciting time, frankly, in the database business where all of a sudden people are building more and more powerful applications that are storing in interesting new ways state about those applications in an operational data store, which is what we do. And being able to build more and more interesting and enriching application experiences that delight end users, that enable software on top of software automation type use cases, frankly than ever before. So, I think that's all very exciting and it's all related to the center of gravity being in software rather than in some distant data kind of machine team down here that's far removed from software.

Steven Dickens: Yeah, I think that makes sense.

Andrew Davidson: But the last piece is that writing software is getting easier with the code assist capabilities. And when writing software is getting easier, that means software developers can do more than ever before. They can handle more complexity than ever before. They can think and move faster than ever before, and that means more software is going to be written. So, I think we're just going to see an acceleration of all the trends we've been seeing.

Steven Dickens: That's certainly how we see it. The co-pilots, I think the consensus estimate is at least 30% more productive. I think specifically for some of those maybe less performant developers, they're going to have that access to supercharge their skills and sort of really get on a pace that is going to just transform.

Andrew Davidson: Absolutely.

Steven Dickens: Andrew, great discussion. Thanks for joining us here on The Six Five Summit.

Andrew Davidson: Thanks so much for having me, Steven. Great to see you.

Steven Dickens: So, you've been watching us here on The Six Five Summit. Please check out the other content, the lots to see. Thanks very much for watching.