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Welcome To The Operations Data Boom: Why Wing Invested In Jut

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Modern IT is the ultimate data-rich environment. Every layer of the stack is instrumented, spewing operations data relevant to performance, reliability, security and customer experience. Developers, operators, DevOps and business users are all consumers of slices of data, depending on them in their respective functional areas. As we instrument more and more, our data streams become richer and more voluminous, expanding our potential to do our respective jobs better. In short, every software company is becoming a data company.

So far so good. But a bigger trend is rolling through the economy: every company is becoming a software company. As software decisively tilts competitive advantage in more and more industries, operations data becomes a critical strategic asset. Its importance transcends the needs of specific groups of users. Operations data in aggregate becomes the key to overall business performance. How long before corporate Boards of Directors establish “Data Committees”?

One of our core investment initiatives at Wing has been around “Data-First Applications”. These applications are both “data-driven”, leveraging insight derived from embedded analytical capabilities, as well as “data-driving”, generating valuable “synthetic” data in the course of usage. They benefit from a virtuous data cycle as usage increases and the synthetic data stockpile grows. Given the data-rich nature of IT operations, this was a natural place to look for Data-First Applications, and we have been pleased to encounter companies such as Pepperdata, Cloudphysics and Moogsoft (a perspective I described last year in “Data-First IT Operations (http://wing.vc/blog/wings-investment-in-moogsoft-and-data-first-it-operations) ”). Meanwhile, Jut has been cranking away in the background, quietly out of view until now.

Jut plays a key role in Data-First operations. It is an Operations Data Hub, where the data being generated by your infrastructure, applications and users is collected and made available for holistic analysis and visualization. If you believe my argument above about operations data becoming a

critical strategic asset in the new software-centric enterprise, then this is an important role indeed. The more your company lives and dies by its software, the more it will benefit from Jut.

Why does the world of operations data need its own data hub technology? Can't it be served with general-purpose products? To a certain degree it can, and that is what many customers have been working with thus far, despite the low-level application complexity this introduces. But there is a lot of specificity in the operations data realm: specific data types; specific data flows; specific analyses; specific use cases; specific workflows. This reality plus the ballooning challenges of scale create the need for a dedicated platform. Splunk can be considered an early existence proof, demonstrating how a dedicated operations data repository can create great value. But requirements have multiplied in variety and grown exponentially in scale since Splunk's formation 12 years ago, creating the need for a new approach.

I have worked with key members of the Jut team since the late 1990's, across four companies and through numerous twists and turns. Their magnum opus to date is Riverbed, which Jut founder / CEO Steve McCanne created in 2002. After a magnificent run optimizing the datapath at Riverbed, Steve turned his attention to data itself, and Wing was honored to invest in his seed financing in 2013 as well as every Jut financing since. Steve and his team have developed truly deep technology at Jut, made available to customers in a download and capped with Juttle, a simple language that enables powerful analytics in a few lines of code. From my own personal experience, it's not hard to see the acceleration potential that Jut offers to the kind of companies I work with every day.

Today Jut is a newly-exposed platform, just entering open beta. Users can already do a lot of previously difficult things with Jut in its current state, and it is intriguing to see the unexpected and sometimes mind-blowing things conceived via Juttle.

The situation will get even more interesting as Data-First Applications are built that leverage Jut's platform. Jut will build some, customers will build many and I expect third-party developers will also see the opportunity to add powerful data capabilities to their operational applications. The momentum behind such innovation is clear: all software companies are becoming data companies, and all companies are becoming software companies. In the past, it's been specialists that have cared about operations data. In the future, it will be the entire company. The operations data boom is already well underway, and it won't be confined to Silicon Valley for long.

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