

Account Warming is a set of best practices developed by the EMC Pathfinders, a self organizing group discovering and teaching new techniques. This presentation was given to thousands of people, across Dell Technologies as well Dell's partner community. This has also been leveraged for workshops and for university curriculum.

This presentation is part of a larger experiment in embracing public, visual personal brand building, available at:

<https://mattschneider-visualcv.github.io/>

VisualCV started as a Pathfinder's project at Dell Technologies while I was mentoring engineers through our career ladder into roles requiring panel & packet review, Principals & Distinguished.





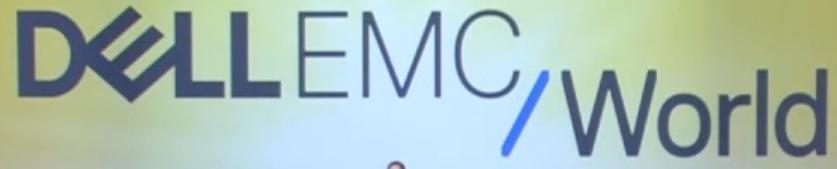
Accour



Forward



Powered By
Pathfinder



When we stand at the center of the world's technology, we stand at the center of human progress... and there is no place I'd rather be."

-Michael Dell

Chairman & CEO Dell Technologies



C 2017

PG-13





But they won't even take a meeting!

15%

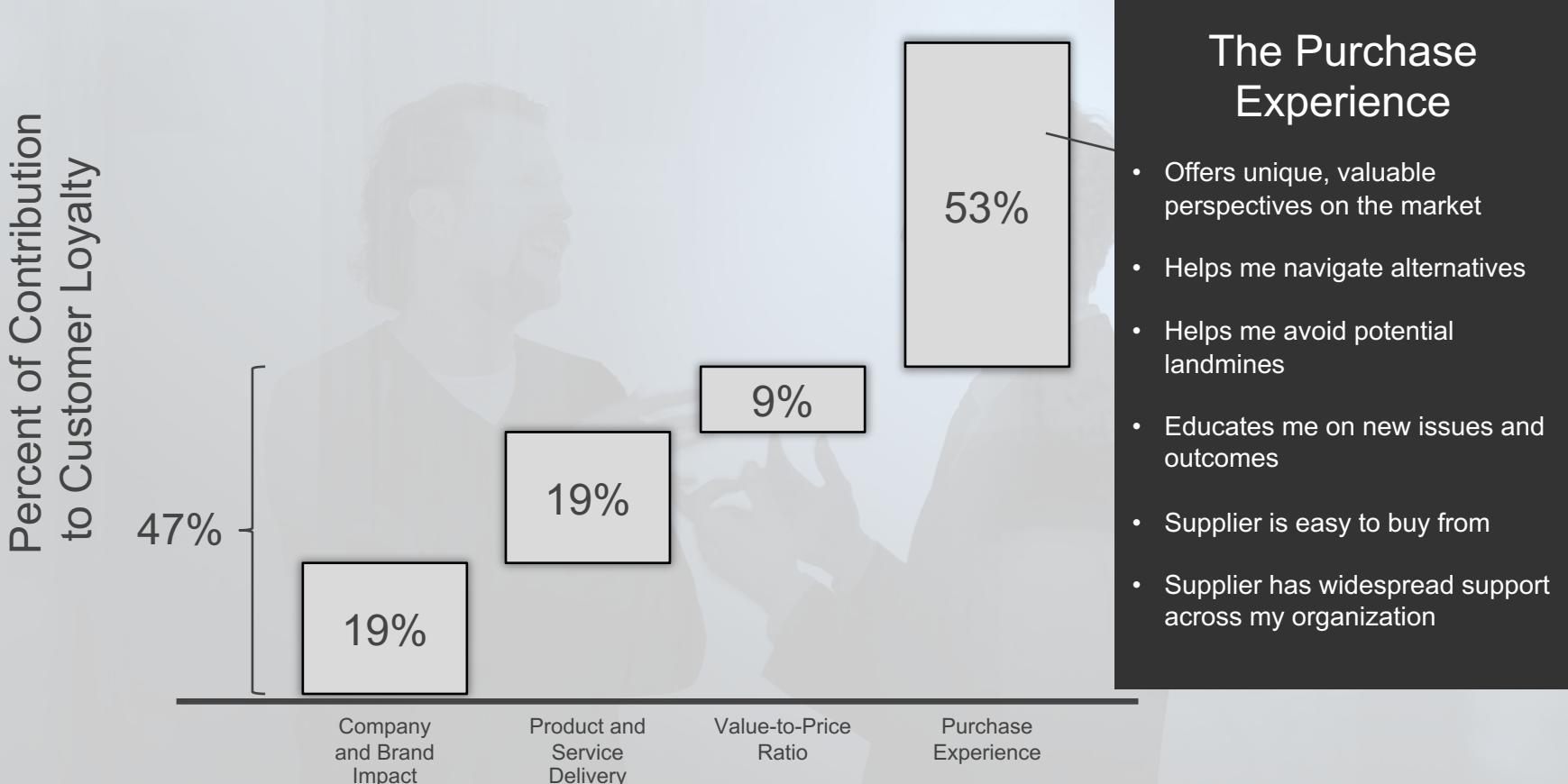
of executives believe that their meetings with salespeople are valuable and live up to their expectations

7%

of executives say they accept a follow-on meeting



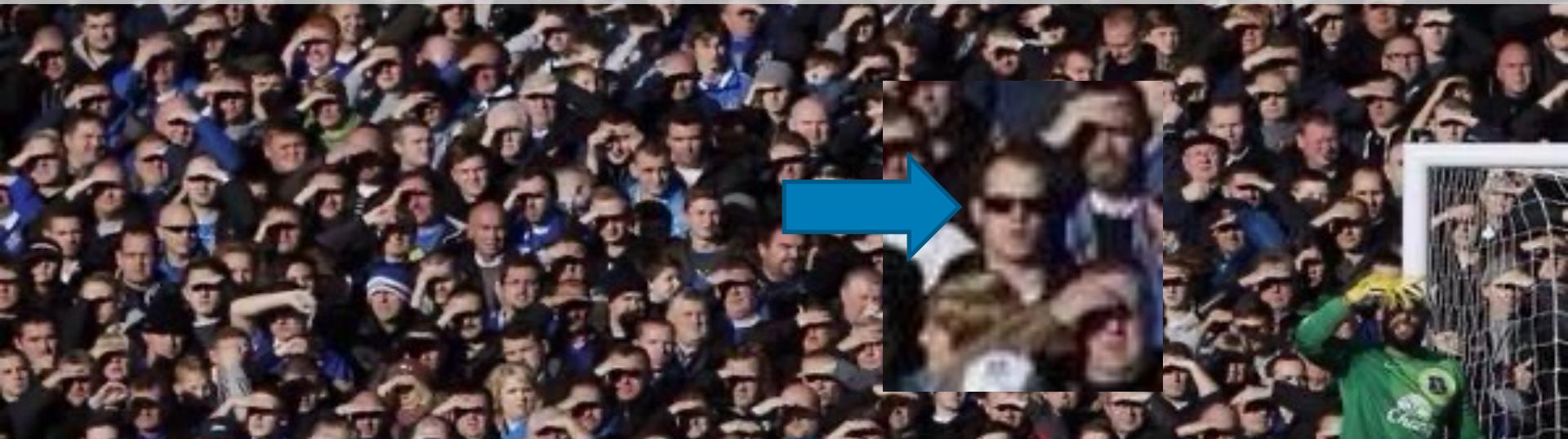
Producing Customer Loyalty







Account warming is all about preparing to differentiate



Preparation often requires no more than 30 minutes

Personal Context



Seeks
Collaboration



Communicates
Effectively

Company Context



Business
Acumen



Customer
Relevant

Industry Context



Leverages
Data



Embraces
Technology



Shares
Ideas

IN GOD WE TRUST

I don't have time for this ??????????????

Time Spent
In Bathroom

Modern
Plumbing

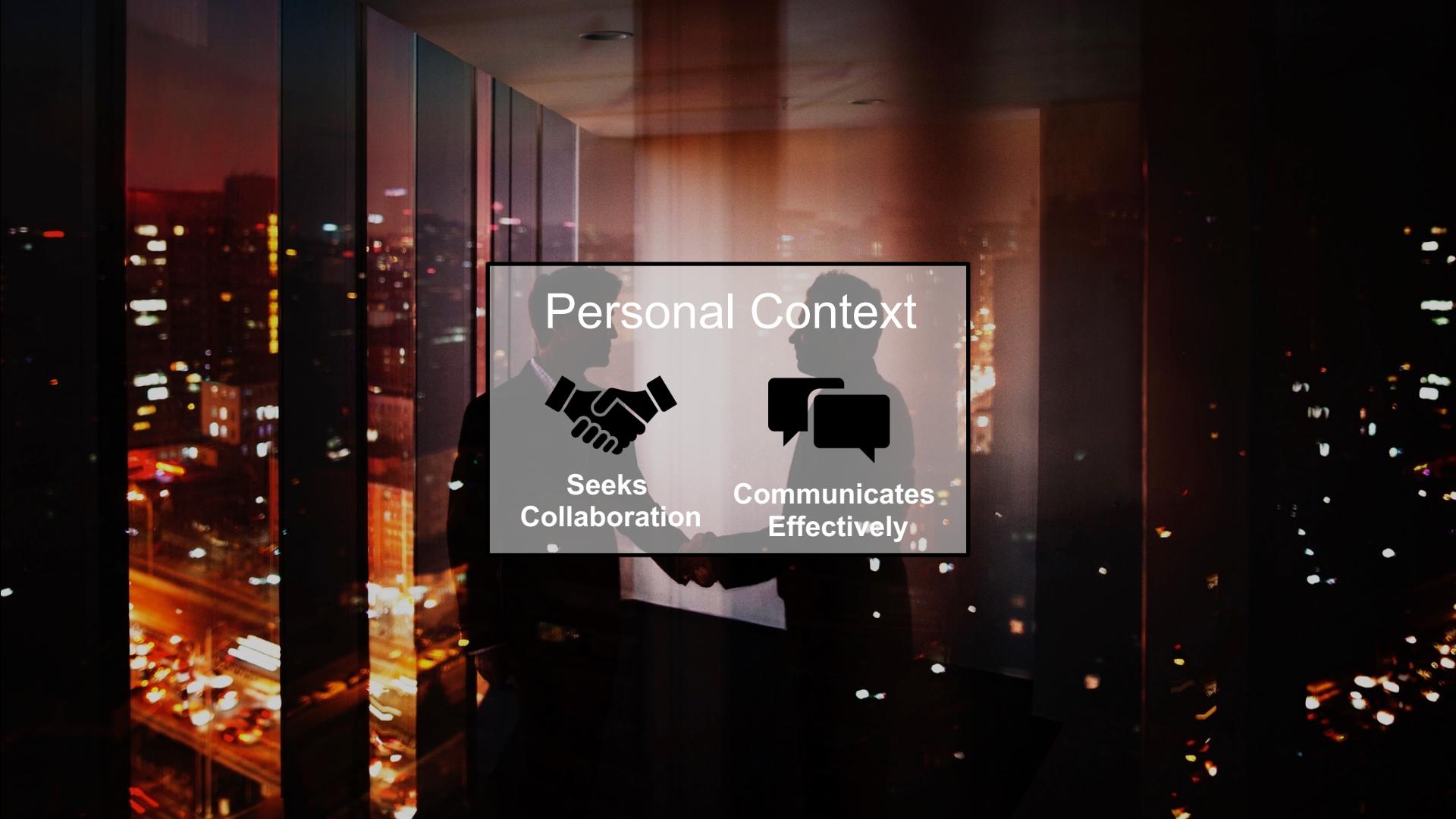
1920's

1950's

1980's

2000s

Invention
Of the
SMARTPHONE

A dark, atmospheric photograph of a city skyline at night, viewed through a window. Two silhouetted figures are in the foreground, one holding a smartphone. A central white rectangular box contains text and icons.

Personal Context



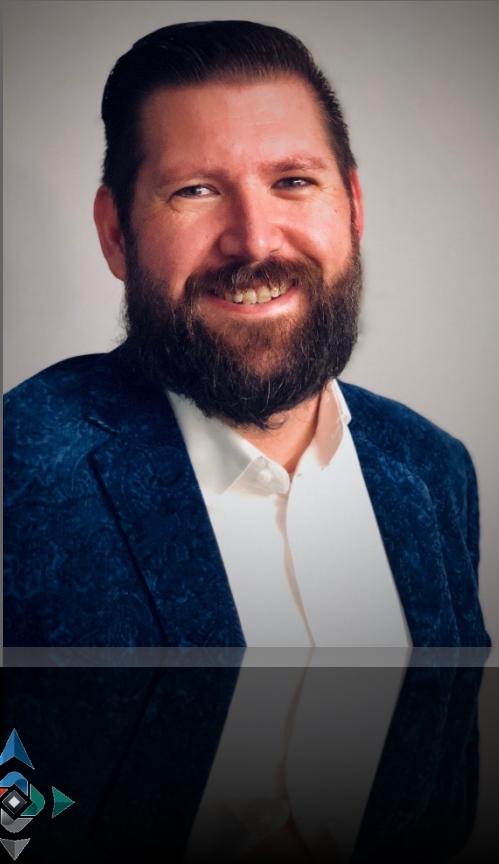
Seeks
Collaboration



Communicates
Effectively

Exercise 1: Personal Context



A professional portrait of Matt Schneider, a man with dark hair and a full beard, wearing a blue blazer over a white shirt. He is smiling at the camera.

Matt Schneider





INSURANCE



LIFE SCIENCES



AIRLINE



LOGISTICS



RETAIL



CONSUMER GOODS



FINANCIAL SERVICES



REAL ESTATE



INFORMATION TECHNOLOGY



CONSULTING



HEALTH CARE



Matt Schneider
Chief Architect | Office of Strategy & Technology
Director | Enterprise Architecture

@md_schneider

/in/mdschneider

<http://blog.mdschneider.me>

Forward



DELL EMC
ELECT

vmware®

vEXPERT

DELL EMC

Researching Individuals...Follow the Rabbit Hole



- Title
- How long have they been there
- What school they went to or affiliation
- Interesting fact about experience
- Their responsibilities (in their own words)

- What are their interests
- Sound bites
- Videos / Blogs

- Conferences they spoke at or attended
- Panels they spoke at
- Meetups involved in
- New media – Snapchat, Slideshare, etc

Daniel Ghelman
VP Mobile Digital Solutions at Brightstar
Miami/Fort Lauderdale Area | Telecommunications
Previous Brightstar, gMed, Motorola Japan
Education University of Illinois at Chicago

Connect **Send Daniel InMail** 2nd

<https://www.linkedin.com/in/danielghelman> Contact Info

VP Global Business Development
Brightstar
February 2011 – July 2014 (3 years 6 months) | Miami/Fort Lauderdale Area
Responsible for identifying, assessing, structuring and commercializing global new business opportunities that have the power to diversify Brightstar and generate meaningful profitable growth for the corporation.

Daniel Ghelman @danghelman · Apr 19 There is a lot more than meets the eye for women in technology! Great presentation @MarianaEnMex @eMergeAmericas

EMERGE AMERICAS 2016

SCHEDULE KEYNOTE SPEAKERS SPEAKERS WIT eGOV ATTENDEES TICKETS

DANIEL GHELMAN
Brightstar
VP of Mobile Digital Solutions
Daniel Ghelman is the Global Head of Mobile Digital Solutions for Miami-Fort Lauderdale, one of the largest private companies based in South Florida, an

New York Media Festival

Daniel Ghelman, Brightstar's Head of Mobile Digital Solutions, joined Warner Music Yonder Music, Dezer and Strat Americas and provided his global perspective on the "Digital Music in International Markets" panel during the New York Media Festival on Oct. 7.

Researching Individuals...Be Personal





Matt Schneider
Field CTO

DELL EMC
Experience

19

21

■ Industry ■ Company ■ Position

Span & Control

90

10

■ Indirect ■ Direct

Budget (MM)

8.7

27.2

4

■ Operate ■ Influence ■ Control

Talking Points

DevOps & ITIL
Transform Yourself
Culture

Interests

Whiskey
Wine
Drones
Travel

Family

Kim
Charlotte (D/10)
Eleanor (D/6)
dogs

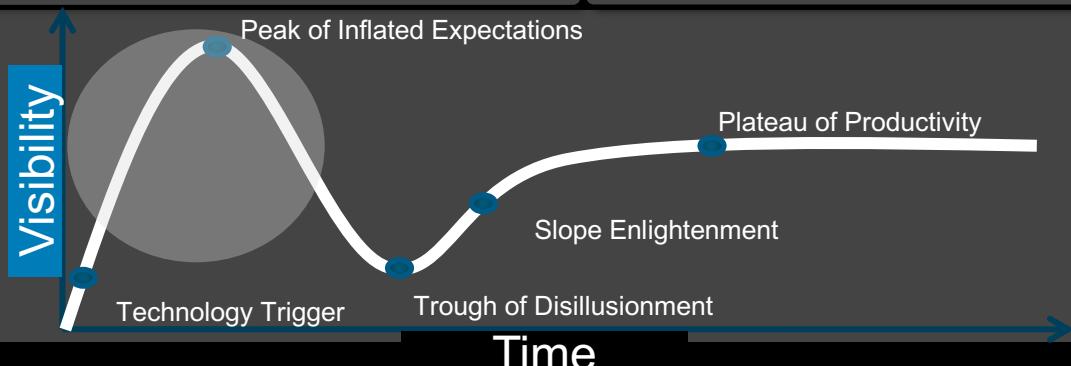
Goals

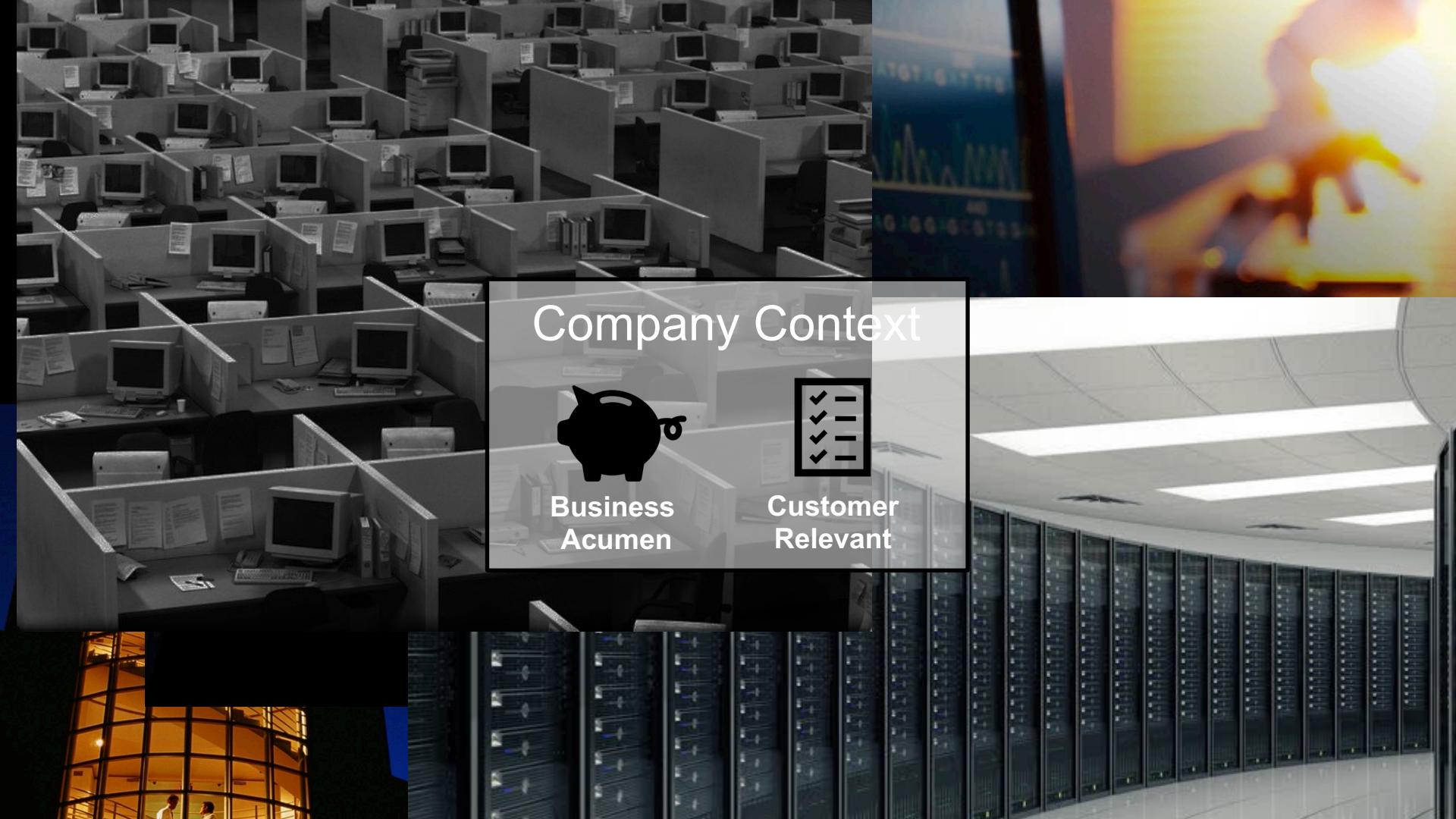
Build a team of Enterprise Architects to drive customer transformation

Community

Has spoken at Gartner, Dell EMC World, Dell Tech World, CIO Summit, etc.

DevOps, Cloud, AI, IOT





Company Context



Business
Acumen



Customer
Relevant

Let's Sell an Isilon

Let's Sell an Isilon

Forward



“Kaier’s Ladder”

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Pathfinder



SysAdmin Task:

Purchase & Configure Isilon

\$150K



IT Technology:

Hadoop

SysAdmin Task:

Purchase & Configure Isilon

\$500K

\$150K



Data Created:

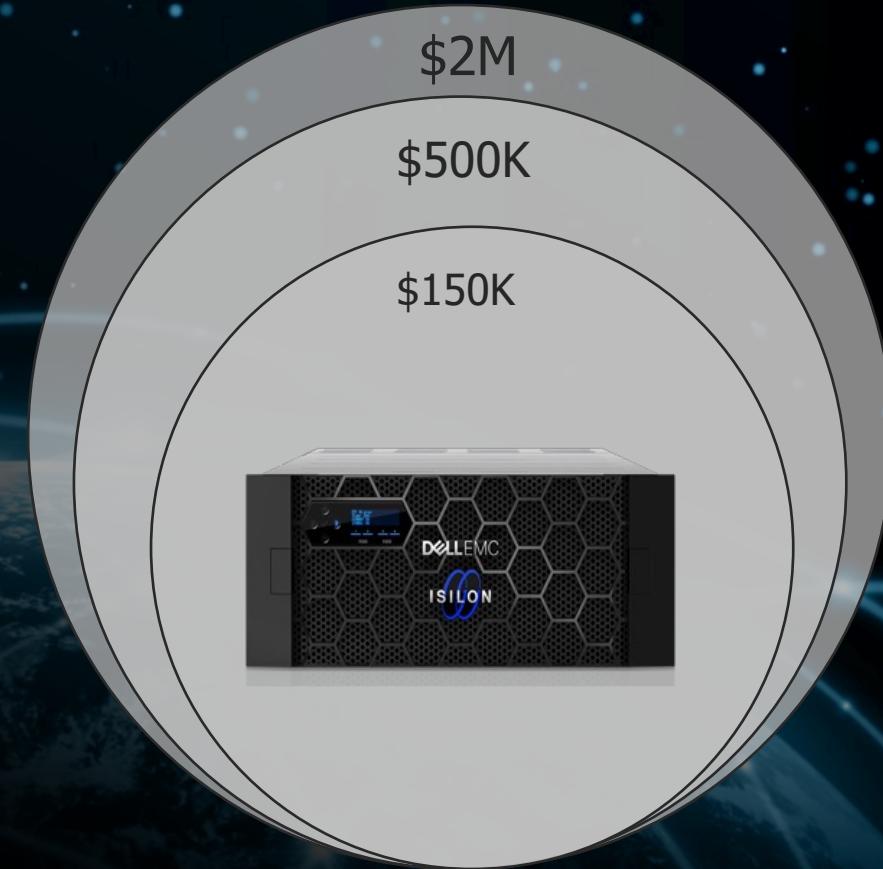
Data Scientist builds massive data set.

IT Technology:

Hadoop

SysAdmin Task:

Purchase & Configure Isilon



Data Scientist Project:

"Understand relationship of demographic to retention"

Data Created:

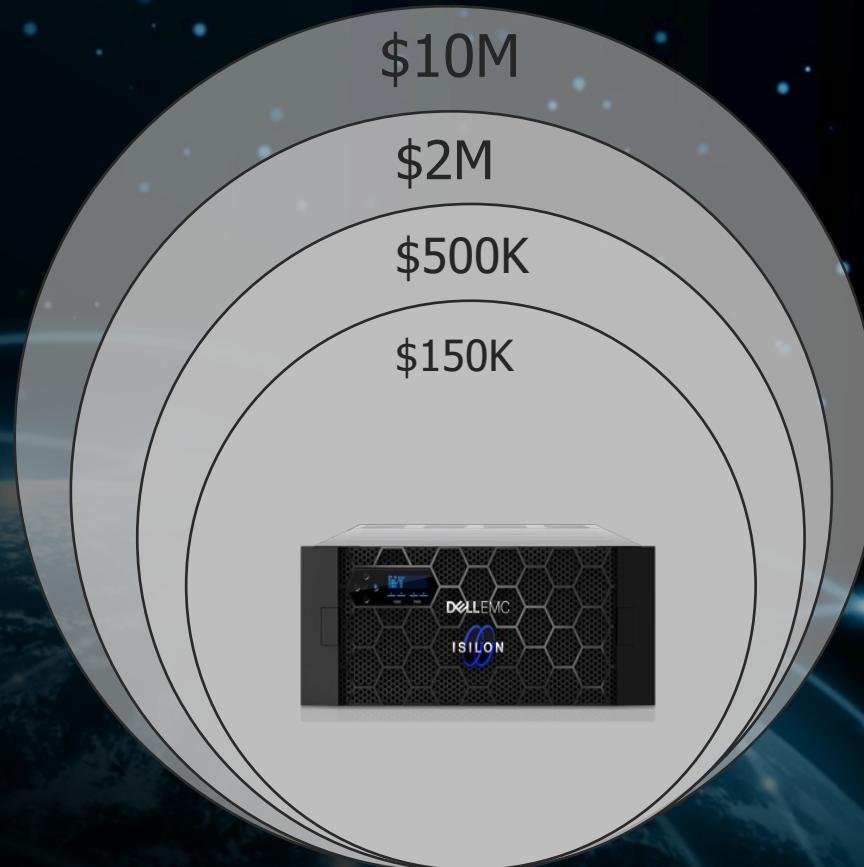
Data Scientist builds massive data set.

IT Technology:

Hadoop

SysAdmin Task:

Purchase & Configure Isilon



Product Mgmt Initiative:

"Gamify Savings."

Data Scientist Project:

"Understand relationship of demographic to retention"

Data Created:

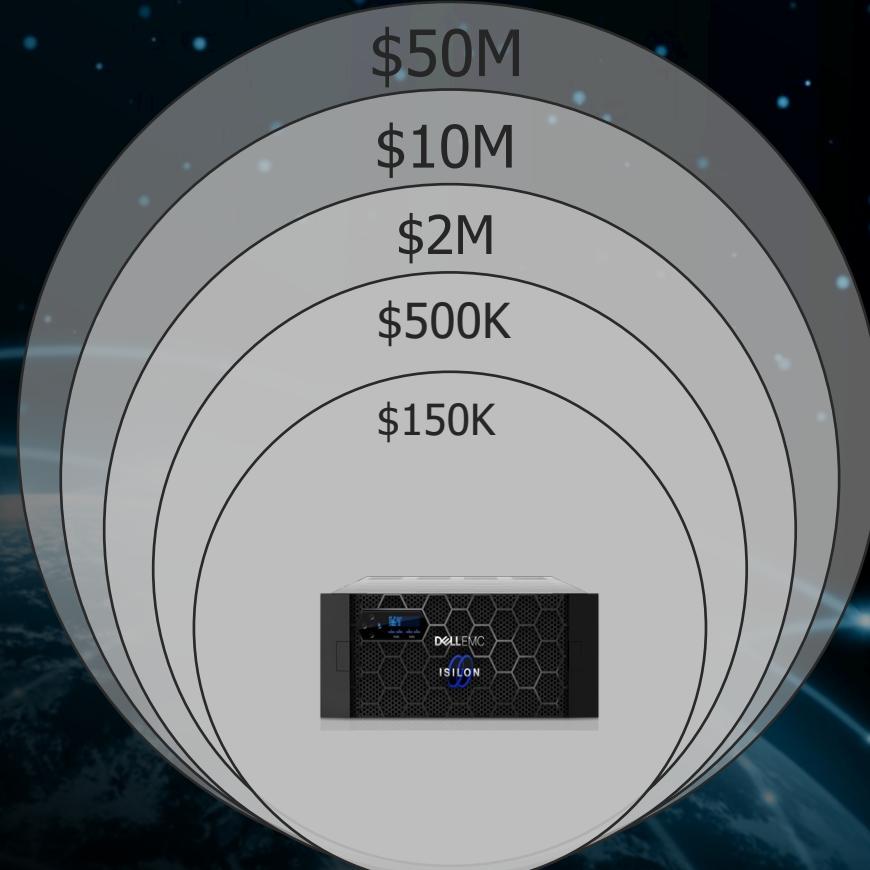
Data Scientist builds massive data set.

IT Technology:

Hadoop

SysAdmin Task:

Purchase & Configure Isilon



CTO's Strategy:

"Create a compelling mobile experience"

Product Mgmt Initiative:

"Gamify Savings."

Data Scientist Project:

"Understand relationship of demographic to retention"

Data Created:

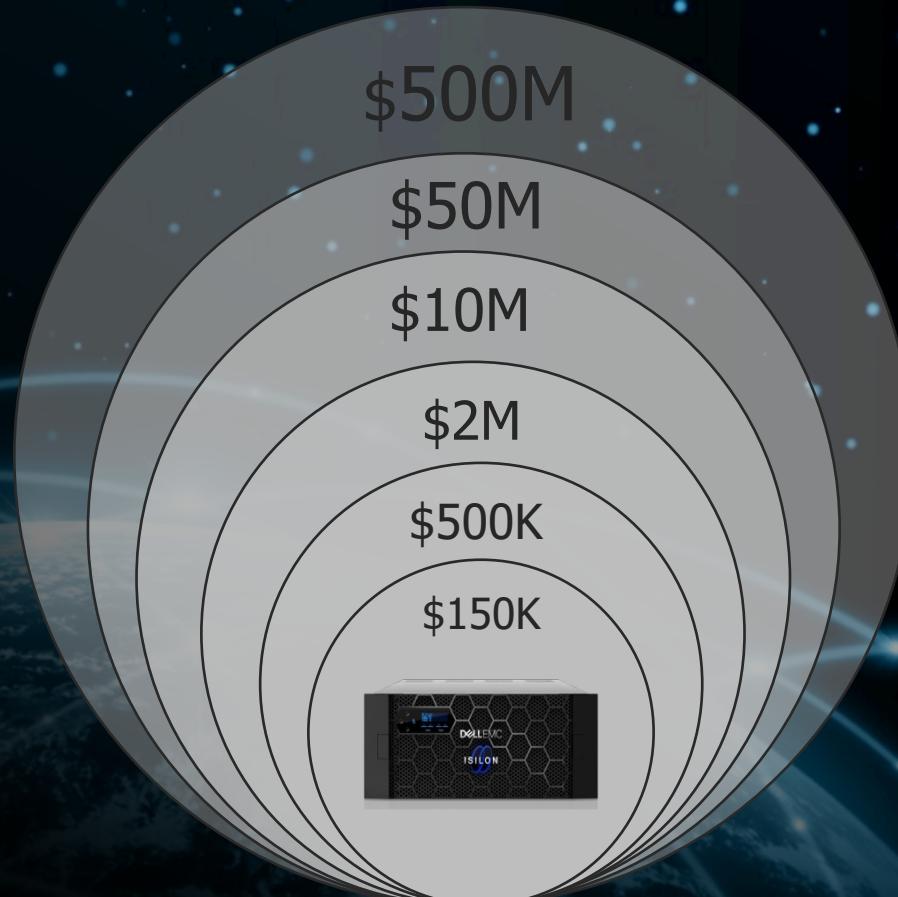
Data Scientist builds massive data set.

IT Technology:

Hadoop

SysAdmin Task:

Purchase & Configure Isilon



CEO's Goal:

"Retain Millennials"

CTO's Strategy:

"Create a compelling mobile experience"

Product Mgmt Initiative:

"Gamify Savings."

Data Scientist Project:

"Understand relationship of demographic to retention"

Data Created:

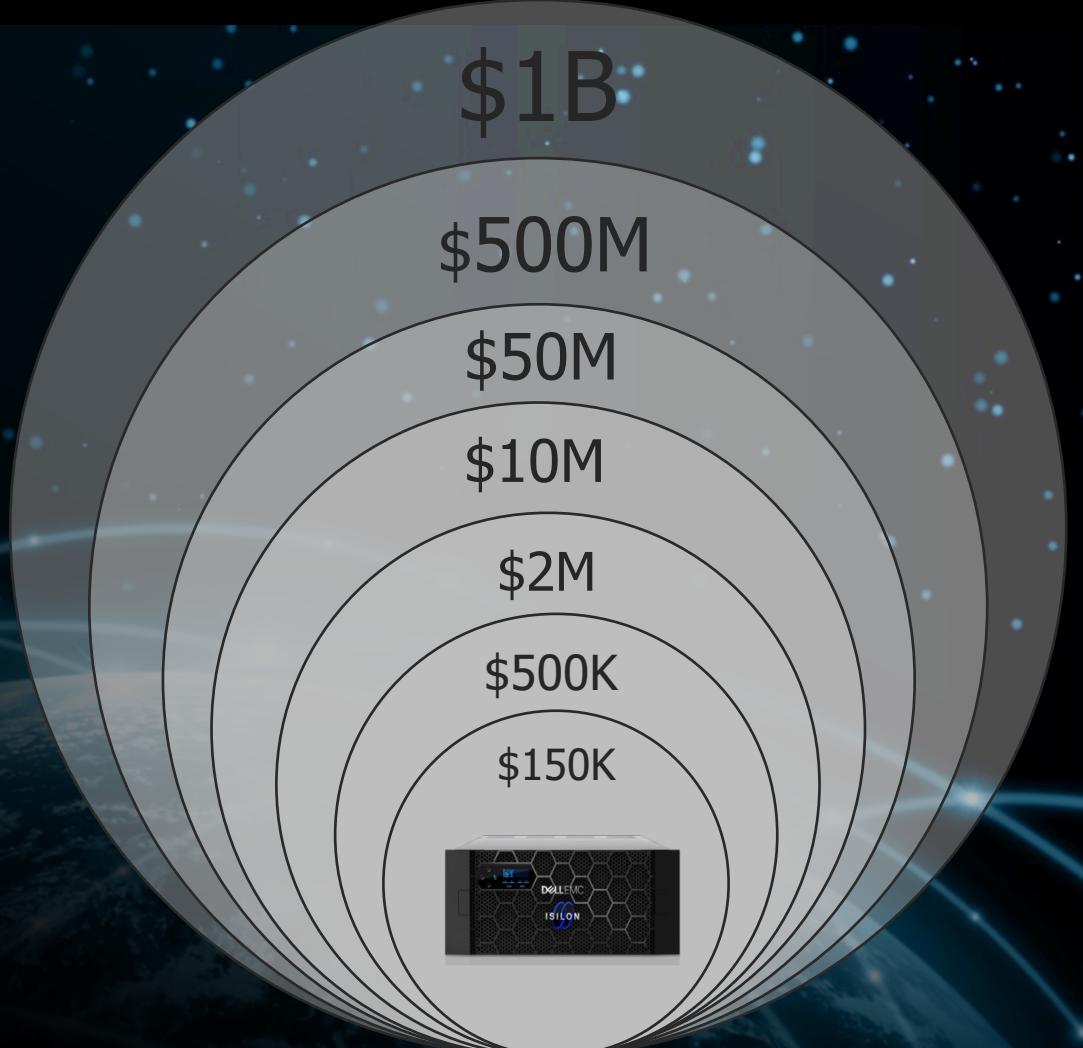
Data Scientist builds massive data set.

IT Technology:

Hadoop

SysAdmin Task:

Purchase & Configure Isilon



Exercise 2: Customer Context



CHALLENGE

If you know this was the efforts each person was working with, and had just 5 minutes with any of these people. What idea would you present to them? How would that tie back to Dell Technologies revenue?

CEO's Goal:

"Retain Millennials"

CTO's Strategy:

"Create a compelling mobile experience"

Product Mgmt Initiative:

"Gamify Savings."

Data Scientist Project:

"Understand relationship of demographic to retention"

Data Created:

Data Scientist builds massive data set.

IT Technology:

Hadoop

A photograph of Michael Dell, founder of Dell Technologies, speaking at a conference. He is a middle-aged man with dark hair, wearing a dark suit jacket over a light blue button-down shirt. He is gesturing with his hands while speaking. A small microphone is clipped to his shirt. The background is a blurred blue and green gradient.

IT is transforming from supporting
the business to becoming the business.

-Michael Dell, DEW Keynote 2017

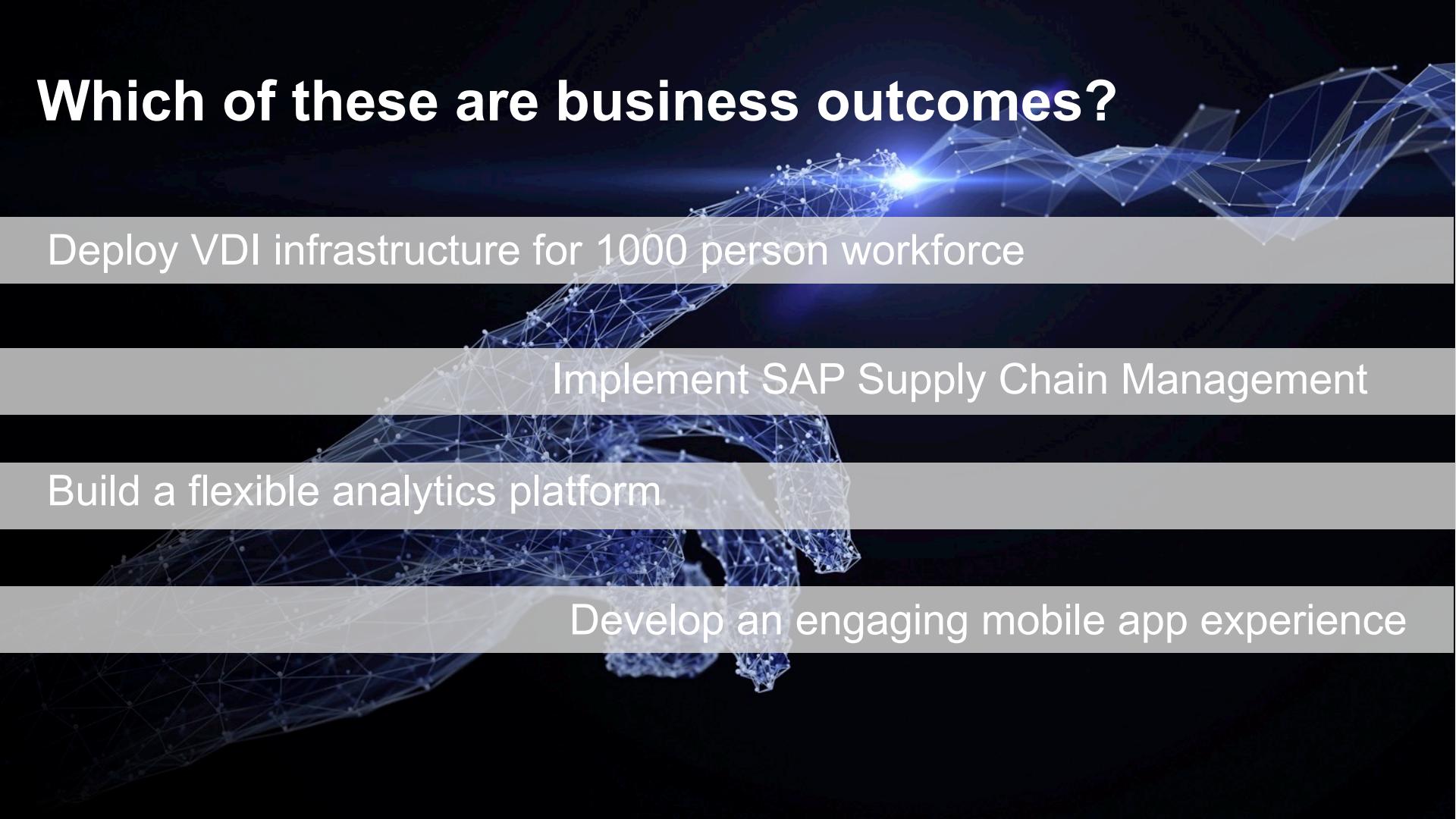
What do we mean?

IT must shift from technology problems to working directly on business outcomes.

This means they need to start to look at things the way executives do.

And if we want to sell to these transforming organizations, so do we.

Which of these are business outcomes?

A dark blue background featuring a glowing, abstract network of interconnected white dots and lines, resembling a molecular or neural structure.

Deploy VDI infrastructure for 1000 person workforce

Implement SAP Supply Chain Management

Build a flexible analytics platform

Develop an engaging mobile app experience

Which of these are business outcomes?



Deploy VDI infrastructure for 1000 person workforce

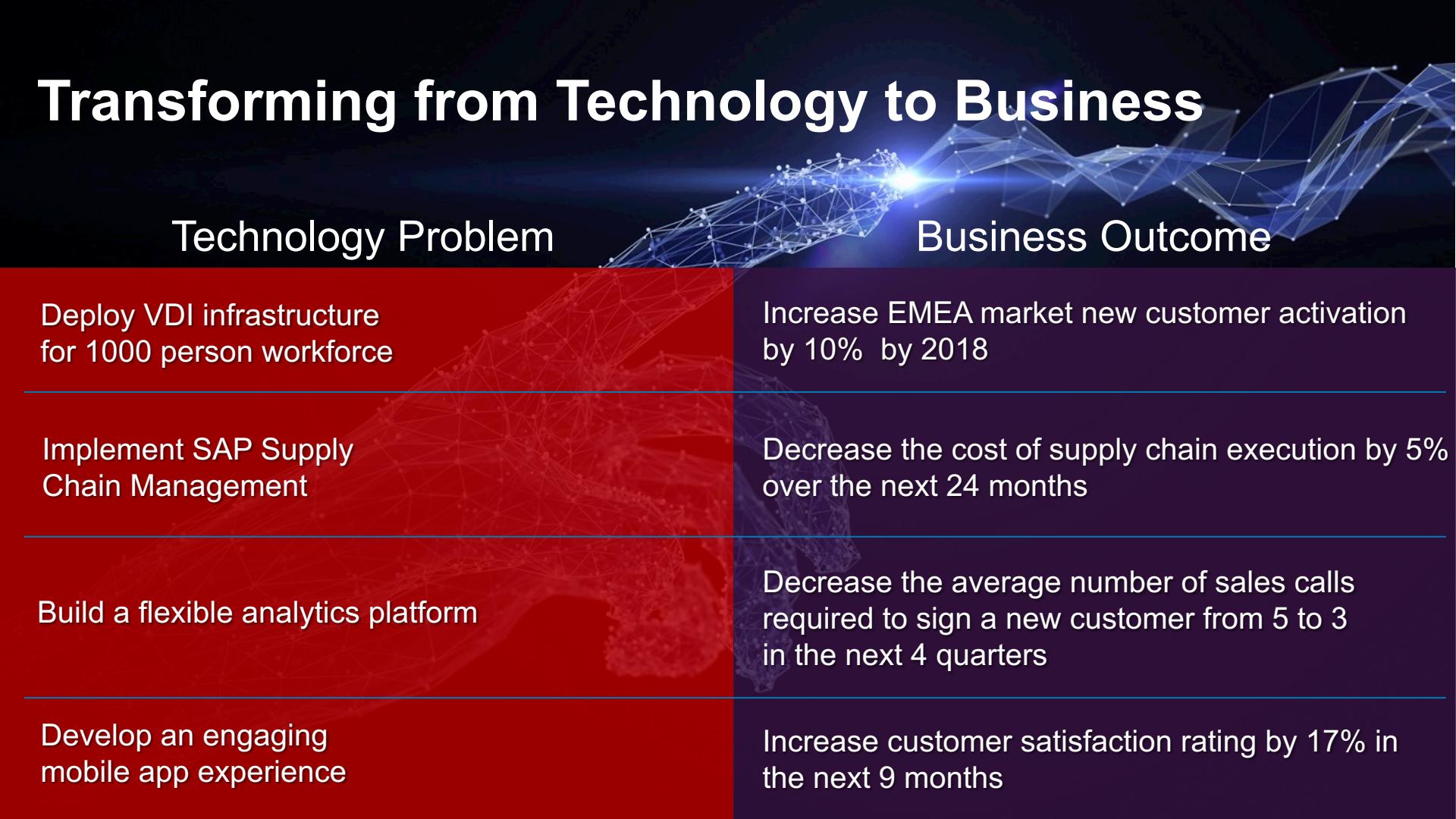
Implement SAP Supply Chain Management

None of These

Build a flexible analytics platform

Develop an engaging mobile app experience

Transforming from Technology to Business



Technology Problem

Deploy VDI infrastructure
for 1000 person workforce

Implement SAP Supply
Chain Management

Build a flexible analytics platform

Develop an engaging
mobile app experience

Business Outcome

Increase EMEA market new customer activation
by 10% by 2018

Decrease the cost of supply chain execution by 5%
over the next 24 months

Decrease the average number of sales calls
required to sign a new customer from 5 to 3
in the next 4 quarters

Increase customer satisfaction rating by 17% in
the next 9 months

Anatomy of a Business Outcome

Action

Target

Metric

Deadline

Increase

EMEA market new customer activation

by 10%

by 2018

Action

Target

Metric

Deadline

Decrease

the cost of supply chain execution

by 5%

over the next 24 months

Action

Target

Decrease the average number of sales calls required to sign a new customer from 5 to 3 in the next 4 quarters

Metric

Deadline

Action

Target

Metric

Deadline

Increase

customer satisfaction rating

by 17%

in the next 9 months

Anatomy of a Business Outcome

We need all 4 to have a complete business outcome.

Action

Target

Metric

Deadline

What are YOUR customer's business outcomes?

What are the **executives** trying to accomplish?

What is their **financial situation**?

What is their relationship in the market to their **competition**?

What gaps or opportunities are there in the **Customer Value Chain**?

Action

Target

Metric

Deadline

How do I learn more?

Start with **Account Warming** exercises you are learning today

Plan some **Topics of Conversation**

Schedule a **Discovery Meeting** for desired outcome identification

Action

Target

Metric

Deadline



I believe that this nation
should commit itself to
achieving the goal,
before this decade is out,
of landing a man on the
moon and returning him
safely to the Earth.



We choose to go to the moon in this decade... not because it is easy, but because they are hard, because that goal will serve to organize and measure the best efforts of the nation; We choose to go to the moon!

because the challenge is one we are willing to accept, one we are unwilling to postpone, and one we intend to win...

Account Research



Why Is Account Research Important?

- What it means to us
- We must find business stakeholders with budget and active projects

**Customers will talk to you about what they believe is relevant to you...
based on brand / perception**

- Customers want to be provided insight, not just interrogated with questions
 - Industry insights
 - Competitor and peer insights
 - How our offerings can help them

Knowledge is Virtually Free

Search everything



Google

Learn everything



edX



HarvardX

Meet everyone



meetup



BLOG



A WORLD WITH MORE YUM!

YUM! GLOBAL NEWSROOM

YUM! GROWS FEMALE LEADERSHIP AT WOMEN'S FOODSERVICE FORUM CONFERENCE
READ MORE

KFC'S REACH HIGH WITH GEDWORKS PROGRAM INVESTS IN EMPLOYEE EDUCATION
READ MORE

EAT A TACO, FEED A DREAM
READ MORE

YUM! BRANDS, KFC, PIZZA HUT AND TACO BELL EXPAND PARENTAL TIME-OFF POLICY AND FAMILY BENEFITS FOR U.S. CORPORATE EMPLOYEES
READ MORE

YUM! BRANDS RECOGNIZED ON FORTUNE'S WORLD'S MOST ADMIRED COMPANIES LIST
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MEET DONALD - KFC FAMILY FUND IN ACTION
READ MORE

PIZZA HUT LAUNCHES THE LITERACY PROJECT
READ MORE

FILTER BY CATEGORY...



LinkedIn

PRESS RELEASE

UNITED STATES
SECURITIES AND EXCHANGE COMMISSION
Washington, D.C. 20549

Form 10-K

(Mark One) ANNUAL REPORT PURSUANT TO SECTION 13 OR 15(d) OF THE SECURITIES EXCHANGE ACT OF 1934
For the fiscal year ended September 27, 2008
 or
 TRANSITION REPORT PURSUANT TO SECTION 13 OR 15(d) OF THE SECURITIES EXCHANGE ACT OF 1934

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Google

Competitor
+

Good

Technology
Analytics
Digital
Mobile
Big Data
Strategy
Seeking
Alpha

Industry Conference Recordings

YouTube afcea technology

- Home
- My Channel
- Trending
- Subscriptions 2
- History
- Watch Later 17
- Purchases 4

LIBRARY

- summer_country
- Hockey
- Hockey music
- Show more

SUBSCRIPTIONS

- RedGreenTV 2
- LBTVPproductions 2
- Tyrez
- Th4WhiteKnife
- stretchp3

+ Browse channels



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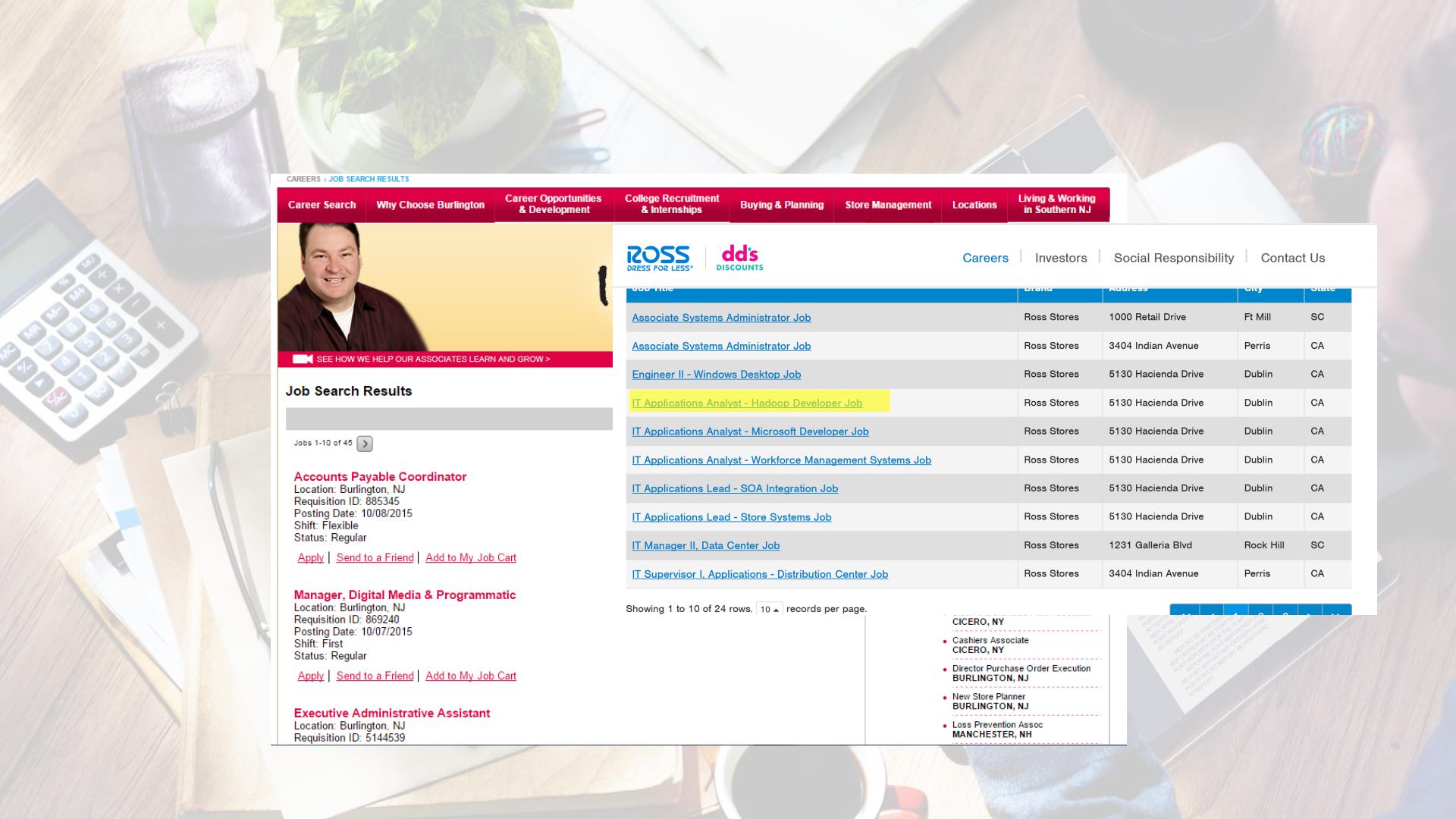
MEDIA ROOM

2015 Press Releases

- 06.18.2015 Burlington Announces New Store Coming to Cedar Hill, TX
- 06.18.2015 Burlington Announces New Store Coming to Alhambra, CA
- 06.03.2015 Burlington Announces New Store Coming to Lufkin, TX
- 06.02.2015 Burlington Gives Back Community Safety Day in Sacramento, CA
- 05.19.2015 Heart of Fitness Recap Press Release
- 05.18.2015 Burlington Gives Back Community Safety Day in Burlington, NC
- 05.18.2015 Burlington Gives Back Community Safety Day in Newark, DE
- 05.07.2015 Burlington Announces New Store Coming to Hollywood, FL
- 05.07.2015 Burlington Announces New Store Coming to Fayetteville, NC
- 05.05.2015 Burlington Announces New Store Coming to Linden, NJ
- 04.28.2015 Burlington Announces New Store Coming to Fort Worth, TX
- 04.08.2015 Burlington Announces New Store Coming to Latham, NY

Logos

[Download JPG](#)[LADIES • MENS • KIDS • HOME • COATS](#)[Download JPG](#)[LADIES • MENS • KIDS • HOME • COATS](#)[Download JPG](#)



CAREERS | JOB SEARCH RESULTS

- Career Search
- Why Choose Burlington
- Career Opportunities & Development
- College Recruitment & Internships
- Buying & Planning
- Store Management
- Locations
- Living & Working in Southern NJ



SEE HOW WE HELP OUR ASSOCIATES LEARN AND GROW >

Job Search Results

Jobs 1-10 of 45 [View All](#)

Accounts Payable Coordinator Location: Burlington, NJ Requisition ID: 885345 Posting Date: 10/08/2015 Shift: Flexible Status: Regular Apply Send to a Friend Add to My Job Cart	Manager, Digital Media & Programmatic Location: Burlington, NJ Requisition ID: 869240 Posting Date: 10/07/2015 Shift: First Status: Regular Apply Send to a Friend Add to My Job Cart	Executive Administrative Assistant Location: Burlington, NJ Requisition ID: 5144539
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Job Title	Brand	Address	City	State
Associate Systems Administrator Job	Ross Stores	1000 Retail Drive	Ft Mill	SC
Associate Systems Administrator Job	Ross Stores	3404 Indian Avenue	Perris	CA
Engineer II - Windows Desktop Job	Ross Stores	5130 Hacienda Drive	Dublin	CA
IT Applications Analyst - Hadoop Developer Job	Ross Stores	5130 Hacienda Drive	Dublin	CA
IT Applications Analyst - Microsoft Developer Job	Ross Stores	5130 Hacienda Drive	Dublin	CA
IT Applications Analyst - Workforce Management Systems Job	Ross Stores	5130 Hacienda Drive	Dublin	CA
IT Applications Lead - SOA Integration Job	Ross Stores	5130 Hacienda Drive	Dublin	CA
IT Applications Lead - Store Systems Job	Ross Stores	5130 Hacienda Drive	Dublin	CA
IT Manager II, Data Center Job	Ross Stores	1231 Galleria Blvd	Rock Hill	SC
IT Supervisor I, Applications - Distribution Center Job	Ross Stores	3404 Indian Avenue	Perris	CA

Showing 1 to 10 of 24 rows. [View All](#) records per page.

CICERO, NY

- Cashiers Associate
CICERO, NY
- Director Purchase Order Execution
BURLINGTON, NJ
- New Store Planner
BURLINGTON, NJ
- Loss Prevention Assoc
MANCHESTER, NH



Reviews

-92 AT&T 10:17 AM Touch to return to call 12:45 90%

PSECU Mobile+ Reviews

Details Reviews Related

★★★ WillisWasabi - Aug 25, 2015

I know I've seen offline balances, but it's not in the app now. Maybe if I have to log in with a password? That seems to only come up if I haven't used it for days. No amount of fiddling brings the password prompt back up. That options needs to be available in a smart place.

1. Watch

★★★ WillisWasabi - Aug 25, 2015

The phone app works very well for me. I was very pleased to see that I also had the option to use my iwatch, however that has not worked at all. I have tried unloading it multiple times and it continues to tell me no accounts are registered. Frustrating!!

2. Watch app doesn't work

★★★ Brooklynn498 - Mar 15, 2016

The phone app works very well for me. I was very pleased to see that I also had the option to use my iwatch, however that has not worked at all. I have tried unloading it multiple times and it continues to tell me no accounts are registered. Frustrating!!

3. Apple Pay and Apple Watch

★★★★ TravisITGuv - Feb 20, 2016

Featured Top Charts Explore Search Updates

Version History

-92 AT&T 10:16 AM Touch to return to call 12:45 90%

PSECU Mobile+ Version History

2.6 Aug 25, 2015

Now check Offline Balances on Apple Watch!
You will need to enable "Offline Balances" upon logging on with your iPhone
Enhancements to mobile deposit including:
• New - instructional endorsement images... [more](#)

2.5 Jan 27, 2015

Version 2.5
• Bug fixes

2.4 Nov 20, 2014

Version 2.4
• Touch ID login now supported
• iOS 8 optimizations
• Bug fixes

2.3 Nov 18, 2014

Version 2.3
• Touch ID login now supported
• iOS 8 optimizations

Featured Top Charts Explore Search Updates

Other Apps

-92 AT&T 10:16 AM Touch to return to call 12:18 90%

Finding Discount DEPT STORES

Allstays LLC >

★★★ (5) \$0.99

Details Reviews Related

More Finding Discount Stores Filter

phoenix az Ms Hy Sa

A Map G Map Share

Walmart 572.67 mi away

6150 South 35th Ave, Phoenix Arizona 85041

Thousands of stores find, call, go, review

Map view, Text view, Search, Filter, See the brands you like at once.

Featured Top Charts Explore Search Updates

10k Annual Report filing

It has excellent info related to:

- Business Overview
- Company Strategy
- Market outlook and opportunities
- Competitors
- Business and technology risks

If Company IS NOT Public, look for the info above using other methods:

- Company websites and blogs
- Youtube and Snapchat channels
- Standard internet searches, etc

Bank Bradesco SA ADR BBD | ★★

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Quote Chart [Stock Analysis](#) Performance Key Ratios Financials Valuation Insiders Overview

Financials Announcements

Filing Type

Annual Report

Annual Report

Quarterly Report

Quarterly Report

Quarterly Report

Quarterly Report

Annual Report

Annual Report

Financial Result

Quarterly Report

customer demand, we may experience higher inventory levels and need to markdown excess or slow-moving inventory, leading to decreased profit margins, or we may have insufficient inventory to meet customer demand, leading to lost sales, either of which could adversely affect our financial performance. We need to purchase inventory sufficiently below conventional retail to maintain our pricing differential to regular department and specialty store prices and to attract customers and sustain our margins, which we may not achieve at various times and which could adversely affect our results.

We must also properly execute our inventory management strategies by appropriately allocating merchandise among our stores, timely and efficiently distributing inventory to stores, maintaining an appropriate mix and level of inventory in stores, appropriately changing the allocation of floor space of stores among product categories to respond to customer demand and effectively managing pricing and markdowns, and there is no assurance we will be able to do so. Failure to effectively execute our opportunistic inventory buying and inventory management strategies could adversely affect our performance and our relationship with our customers.

Failure to identify customer trends and preferences to meet customer demand could negatively impact our performance.

Because our success depends on our ability to meet customer demand, we work to follow customer trends and preferences on an ongoing basis and to buy inventory in response to those trends and preferences. However, identifying consumer trends and preferences in the diverse product lines and many markets in which we do business and successfully meeting customer demand across those lines and for those markets on a timely basis is challenging. Although our flexible business model allows us to buy close to need and in response to consumer preferences and trends and to expand and contract merchandise categories in response to consumers' changing tastes, we may not do so successfully, which could adversely affect our results.

If we are unable to renew or replace our store leases or enter into leases for new stores on favorable terms, or if one or more of our current leases are terminated prior to the expiration of their stated term and we cannot find suitable alternate locations, our growth and profitability could be negatively impacted.

Most of our current leases expire at various dates after five or ten-year terms, the majority of which are subject to our option to renew such leases for several additional five-year periods. Our ability to renew any existing lease or, if such lease cannot be renewed, our ability to lease a suitable alternative location, and our ability to enter into leases for new stores on favorable terms will depend on many factors, some of which may not be within our control, such as conditions in the local real estate market, competition for desirable properties and our relationships with current and prospective landlords. If we are unable to renew existing leases or lease suitable alternative locations, or enter into leases for new stores on favorable terms, our growth and profitability may be negatively impacted.

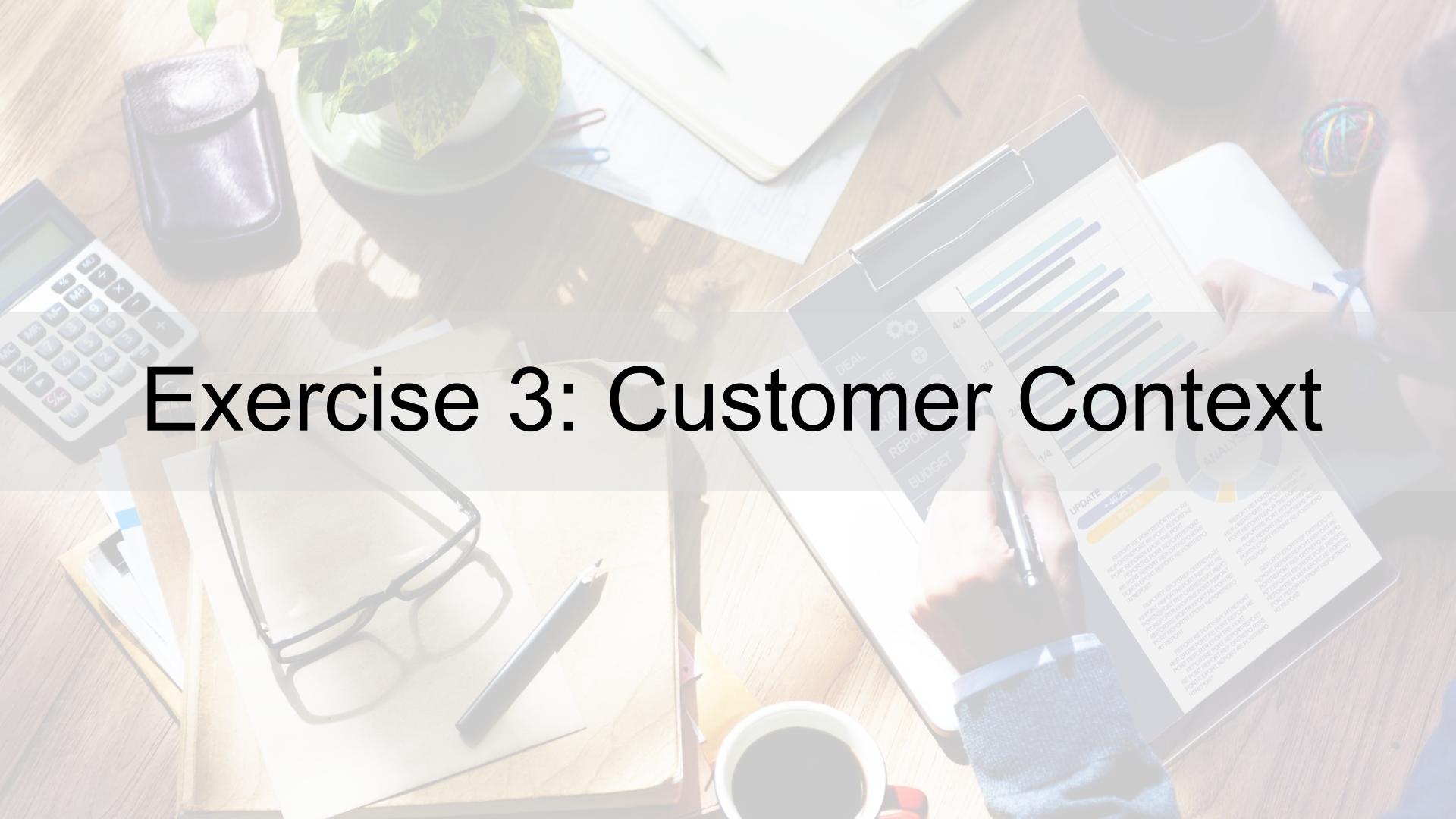
Extreme and/or unseasonable weather conditions could have a significant adverse effect on our business, financial condition and results of operations.

Extreme weather conditions in the areas in which our stores are located could have a material adverse effect on our business, financial condition and results of operations. For example, heavy snowfall or other extreme weather conditions over a prolonged period might make it difficult for our customers or associates to travel to our stores. In addition, unforeseen public health issues, natural disasters such as hurricanes, tornadoes, floods, earthquakes, and other extreme weather or climate conditions, or a combination of these or other factors, could severely damage or destroy one or more of our stores or facilities located in the affected areas, thereby disrupting our business operations. Any of these events or circumstances could disrupt the operations of one or more of our vendors or one or more of our stores located in the affected areas. Day-to-day operations, particularly our ability to receive products from our vendors or transport products to our stores, could be adversely affected, or we could be required to close stores. As a result, our business could be adversely affected.

WHAT INFORMATION ARE WE LOOKING FOR?

- How do they make money
- Financial performance of the company
- Recent Acquisition or plans to acquire companies
- Business Expansion plans
- Leadership priorities & top goals
- Job postings
- New products or services they are releasing
- Forward looking comments from executives (e.g. CEO letter to shareholders)
- Trends in their market/industry forcing big changes
- Large projects that have large potential earnings / cost savings for customer
- What if anything they (and their competitors) are doing in these areas:
 - › Mobile
 - › Social
 - › Next Gen analytics / big data

Exercise 3: Customer Context





TOYOTA





Industry Context



Leverages
Data



Embraces
Technology



Shares
Ideas

A white humanoid robot with a smooth, featureless face and articulated arms is seated in the driver's seat of a light-colored car. The robot is looking forward, and its hands are positioned on the steering wheel. The car is shown from a three-quarter front angle, with the interior visible through the windows. The background is a blurred landscape with warm, golden-hour lighting.

Exercise : Industry Context



YOU Make this REAL



YOU Need to be the Change Agent



- The SE is OUR “Secret Weapon” in creating deeply engaged customers. A change agent.
- The objective is to elevate the conversation to help the sales team gain access to higher executives in an account.
- You have the opportunity to become the trusted advisor to our customer’s **technical** team
- Dell EMC can make a positive impact along the entire length of the customer’s value chain; business strategy, supply chain, sales and marketing all being driven from the data center
- Engaging in conversations that our competitors can’t have often means that we don’t have to compete

Being a Change Agent



Come Along for A Meeting
Because You are “The SE on the
Account”

Act as an Observer or “Guest” at
Meetings

Give the Best “ProductX”
Presentation out there

Be there just “to meet the team”

Talk about Tactical projects and
issues

Stick with the “Status Quo”



Bring Knowledge of Company
Roadmap and Direction (State of
the Business conversation)

Research customer to bring
Insight about them and Industry
Knowledge

Share Success Stories From Your
Large Network of Customers

Be there to convey that you will
“ensure customer success”

Bring the conversation to a
Strategic Level

Don’t be afraid to challenge the
customer



Be Visible, be everywhere, be observant

- Cube Names, research them
- Whiteboards, scrum boards, snapshot that to memory
- Pre-Meeting Banter, fuel the fire
- Social Outings (we have to get back to entertaining..alone)
- YouTube...the comment section...the recommended items
- Expand your Social Media profile
- InFocus Blogs, Learning Zone, COOL STUFF
- MeetUps (the new VMUG)



Forward



Pathfinder