

# ICT Panel Interview: Optimized Answer Architecture Cards

## Strategic Framework for Each Anticipated Question

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### Q1: Reconciling KPIs Across Disparate Systems

**QUESTION:** "How would you reconcile different KPIs and metrics across our 11 portfolio companies using different ERP systems?"

**COMPETENCY:** Data Standardization & Architecture

**LIKELY ASKER:** Bob Toupin (Executive/Strategic)

#### 1. STRATEGIC FRAMING (10 seconds)

- **Acknowledgment:** "This is the cornerstone challenge of multi-entity consolidation - exactly what I solved at Trulieve across state operations."
- **Context Bridge:** "With 11 companies using terms like 'healthcare' vs 'hospitals' vs 'medical buildings,' standardization unlocks your quote-to-close optimization."
- **Thesis Statement:** "My approach creates a unified semantic layer in Snowflake while preserving local business context."

#### 2. STRUCTURED RESPONSE (60-90 seconds)

##### BEHAVIORAL Approach:

- **Selected STAR:** STAR 5 - Unifying Multi-Entity Business (Trulieve)
- **Key Metrics:** 50% reporting reduction, unified view across disparate systems
- **Stakeholder Impact:** Enabled PE board to make data-driven capital allocation decisions
- **Learning Element:** "I learned that technical unification must happen alongside business process alignment"

##### Structured Framework:

1. **Discovery Phase (Weeks 1-2):** Map current state across Syspro/Sage systems
2. **Standardization Workshops (Week 3):** Align with 8 presidents on core definitions
3. **Technical Implementation (Weeks 4-8):** Build normalized layer in Snowflake
4. **Governance Framework (Ongoing):** Establish data stewardship model

#### 3. ENGAGEMENT TECHNIQUES

- **Check-in:** "Bob, this mirrors your BlueLinx experience with customer categorization, doesn't it?"
- **Depth Offering:** "I can walk through the specific Snowflake architecture if helpful"

- **Team Mention:** "Geoffrey's Oracle expertise would be invaluable for the ERP mapping phase"

#### 4. PRESSURE RESPONSE LAYER

- **Technical Detail:** "We'd use Snowflake's variant data type to preserve source system nuances while creating conformed dimensions"
- **Alternative:** "If full standardization proves challenging initially, we could start with a federated approach"
- **Lesson:** "At Trulieve, we learned to standardize metrics before terminology - gets buy-in faster"

#### 5. ANSWER HIGHLIGHTS

- **Power Words:** UNIFIED, SNOWFLAKE, STANDARDIZATION, GOVERNANCE, SCALABLE
  - **Key Metrics:** 50% reduction, 11 companies, 3-week discovery
  - **Closing Transition:** "This foundation enables everything else - from quote-to-close to customer analytics"
  - **Energy Level:** 8/10
  - **Pause Point:** After "preserving local business context"
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### Q2: Implementing Change Management

**QUESTION:** "Describe your approach to implementing change management for new analytics tools across resistant user groups."

**COMPETENCY:** Change Leadership & Adoption

**LIKELY ASKER:** Geoffrey Patton (Manager/Operational)

#### 1. STRATEGIC FRAMING (10 seconds)

- **Acknowledgment:** "Change management is where most analytics initiatives fail - technology is only 30% of the solution."
- **Context Bridge:** "Moving from Excel to Power BI across 22 locations requires systematic adoption strategy."
- **Thesis Statement:** "I use a champion-led approach that turns skeptics into evangelists."

#### 2. STRUCTURED RESPONSE (60-90 seconds)

**BEHAVIORAL Approach:**

- **Selected STAR:** STAR 7 - Driving Analytics Culture Change (Home Depot)
- **Key Metrics:** 30% adoption increase, 50+ training sessions, \$3.2M value unlocked
- **Stakeholder Impact:** Field teams went from resistance to dependency on dashboards

- **Learning Element:** "Success comes from meeting users where they are, not where we want them to be"

### Implementation Framework:

1. **Champion Identification:** Find influential early adopters in each location
2. **Pilot Program:** Start with most receptive team, create success stories
3. **Hands-on Training:** 50+ sessions tailored to specific roles
4. **Iterative Improvement:** Weekly feedback loops and rapid adjustments

### 3. ENGAGEMENT TECHNIQUES

- **Check-in:** "Geoffrey, your transformation experience at BeyondTrust probably encountered similar resistance?"
- **Depth Offering:** "I have a detailed change management playbook I can share"
- **Team Mention:** "Mickey's existing relationships would accelerate champion identification"

### 4. PRESSURE RESPONSE LAYER

- **Additional Detail:** "I track adoption through login frequency, query patterns, and decision attribution"
- **Alternative:** "For extreme resistance, I've used 'shadow IT' approaches - prove value before formal rollout"
- **Lesson:** "Video tutorials at midnight sounds extreme, but async learning drives adoption"

### 5. ANSWER HIGHLIGHTS

- **Power Words:** CHAMPION-LED, EVANGELISTS, HANDS-ON, ADOPTION, TRANSFORMATION
- **Key Metrics:** 30% increase, 50 sessions, 3 months
- **Closing Transition:** "Change management is ongoing - not a project phase"
- **Energy Level:** 7/10
- **Pause Point:** After "skeptics into evangelists"

## Q3: Building and Maturing Analytics Team

**QUESTION:** "How would you build and mature our analytics capabilities while managing a contractor and developing team skills?"

**COMPETENCY:** Team Development & Leadership

**LIKELY ASKER:** Bob Toupin (Executive/Strategic)

### 1. STRATEGIC FRAMING (10 seconds)

- **Acknowledgment:** "The player-coach model you've described is exactly how I've operated throughout my career."
- **Context Bridge:** "With Mickey's Power BI expertise and zero Snowflake knowledge on the team, skill transfer is critical."
- **Thesis Statement:** "I build self-sufficient teams through paired programming and documented knowledge transfer."

## 2. STRUCTURED RESPONSE (60-90 seconds)

### BEHAVIORAL Approach:

- **Selected STAR:** STAR 2 - Snowflake Migration (Turner Broadcasting)
- **Key Metrics:** Team self-sufficient in 60 days, 40% cost reduction maintained
- **Stakeholder Impact:** Eliminated external consultant dependency
- **Learning Element:** "Documentation plus hands-on practice equals sustainable expertise"

### Team Development Framework:

1. **Current State Assessment:** Map Mickey's strengths, identify Snowflake gaps
2. **Paired Programming:** Work alongside Mickey on Power BI optimization
3. **Knowledge Transfer:** Create ICT-specific Snowflake playbook
4. **Capability Building:** Weekly learning sessions, certification paths

## 3. ENGAGEMENT TECHNIQUES

- **Check-in:** "Mickey, what Power BI skills would you most want to develop further?"
- **Depth Offering:** "I can detail the 60-day Snowflake enablement plan"
- **Team Mention:** "Geoffrey's project management expertise would help structure the learning roadmap"

## 4. PRESSURE RESPONSE LAYER

- **Technical Detail:** "Week 1: Snowflake basics, Week 2-3: Virtual warehouses, Week 4-6: Performance tuning"
- **Alternative:** "If time is critical, we could bring in Snowflake trainers for intensive bootcamp"
- **Lesson:** "At Turner, I learned that teaching others solidifies your own expertise"

## 5. ANSWER HIGHLIGHTS

- **Power Words:** PLAYER-COACH, SELF-SUFFICIENT, PAIRED-PROGRAMMING, ENABLEMENT, SUSTAINABLE
- **Key Metrics:** 60 days, 75% hands-on, 10-person team
- **Closing Transition:** "Building capabilities ensures ICT isn't dependent on any single person"
- **Energy Level:** 7/10

- **Pause Point:** After "documented knowledge transfer"
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## Q4: Power BI and Snowflake Architecture Design

**QUESTION:** "Walk us through your approach to designing a scalable Power BI and Snowflake architecture for our multi-company environment."

**COMPETENCY:** Technical Architecture & Design

**LIKELY ASKER:** Mickey Williams (Technical Expert)

### 1. STRATEGIC FRAMING (10 seconds)

- **Acknowledgment:** "This architecture will determine whether we achieve sub-second response times or suffer from performance issues."
- **Context Bridge:** "With 11 companies and data center cooling growing 16.4% CAGR, we need an architecture that scales."
- **Thesis Statement:** "I design for today's needs while architecting for tomorrow's growth."

### 2. STRUCTURED RESPONSE (60-90 seconds)

**TECHNICAL Approach:**

- **Methodology:** Star schema in Snowflake, composite models in Power BI
- **Specific Example:** STAR 2 - Turner Broadcasting migration achieving 40% performance improvement
- **Trade-offs:** "DirectQuery for real-time vs Import for performance - we'll use composite models"
- **Scalability:** "Virtual warehouses auto-scale, zero-copy clones for testing"

**Architecture Layers:**

1. **Raw Layer:** Unchanged source data from Syspro/Sage
2. **Staging Layer:** Cleaned, normalized with Talend
3. **Semantic Layer:** Business-friendly star schema
4. **Presentation Layer:** Power BI with row-level security

### 3. ENGAGEMENT TECHNIQUES

- **Check-in:** "Mickey, what performance challenges have you encountered with the current setup?"
- **Depth Offering:** "I can diagram the specific data flow if that would be helpful"
- **Team Mention:** "Your existing Power BI data models would integrate seamlessly"

### 4. PRESSURE RESPONSE LAYER

- **Technical Detail:** "We'd use Snowflake streams and tasks for CDC, materialized views for aggregations"
- **Alternative:** "Could start with medallion architecture if star schema seems too complex initially"
- **Lesson:** "At Turner, we learned to optimize for query patterns, not storage efficiency"

## 5. ANSWER HIGHLIGHTS

- **Power Words:** SCALABLE, COMPOSITE-MODELS, STAR-SCHEMA, AUTO-SCALE, PERFORMANCE
  - **Key Metrics:** 40% improvement, sub-second response, 11 companies
  - **Closing Transition:** "This architecture supports both today's reporting and tomorrow's AI initiatives"
  - **Energy Level:** 9/10
  - **Pause Point:** After "tomorrow's growth"
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## Q5: Power BI Development from Scratch

**QUESTION:** "How would you approach building Power BI dashboards from scratch given our current limited implementation?"

**COMPETENCY:** Hands-on Development & Execution

**LIKELY ASKER:** Bob Toupin (Executive/Strategic)

### 1. STRATEGIC FRAMING (10 seconds)

- **Acknowledgment:** "Building from scratch is actually an advantage - no technical debt to manage."
- **Context Bridge:** "Your quote-to-close dashboard will be our proof of concept for enterprise rollout."
- **Thesis Statement:** "I deliver working dashboards in weeks, not months."

### 2. STRUCTURED RESPONSE (60-90 seconds)

**BEHAVIORAL Approach:**

- **Selected STAR:** STAR 1 - Building BI Platform from Ground Up (Trulieve)
- **Key Metrics:** 10+ dashboards built, 50% reporting reduction, 5% sales increase
- **Stakeholder Impact:** CEO went from waiting days to having real-time insights
- **Learning Element:** "Start with highest-value dashboard to build momentum"

**30-60-90 Day Execution:**

1. **Days 1-30:** Stabilize current work, deliver quote-to-close dashboard
2. **Days 31-60:** Build 5 core KPI dashboards, establish governance

3. **Days 61-90:** Roll out to all 8 presidents, achieve mission-critical status

### 3. ENGAGEMENT TECHNIQUES

- **Check-in:** "Bob, which KPI would create the most immediate impact?"
- **Depth Offering:** "I have dashboard templates we could review together"
- **Team Mention:** "Building on Mickey's foundation accelerates timeline significantly"

### 4. PRESSURE RESPONSE LAYER

- **Additional Detail:** "Week 1: Data model, Week 2: Visualizations, Week 3: Testing and deployment"
- **Alternative:** "Could purchase Power BI accelerators to speed initial development"
- **Lesson:** "At Trulieve, we learned to show value fast, then iterate"

### 5. ANSWER HIGHLIGHTS

- **Power Words:** PROOF-OF-CONCEPT, MISSION-CRITICAL, ACCELERATE, MOMENTUM, REAL-TIME
  - **Key Metrics:** 3 weeks first dashboard, 50% reduction, 10+ dashboards
  - **Closing Transition:** "Success breeds success - one great dashboard drives demand for more"
  - **Energy Level:** 8/10
  - **Pause Point:** After "weeks, not months"
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## Q6: Technical Problem-Solving Scenario

**QUESTION:** "A critical Power BI report fails during month-end close. Walk us through your troubleshooting approach."

**COMPETENCY:** Crisis Management & Technical Depth

**LIKELY ASKER:** Mickey Williams (Technical Expert)

### 1. STRATEGIC FRAMING (10 seconds)

- **Acknowledgment:** "Production failures during critical periods test both technical skills and composure."
- **Context Bridge:** "With 8 presidents depending on month-end reports, downtime isn't an option."
- **Thesis Statement:** "I follow a systematic triage approach while maintaining stakeholder communication."

### 2. STRUCTURED RESPONSE (60-90 seconds)

**TECHNICAL Approach:**

- **Methodology:** Root cause analysis, temporary workaround, permanent fix
- **Specific Example:** STAR 6 - CEO Report Automation achieving 99.9% uptime
- **Trade-offs:** "Quick fix vs proper solution - sometimes you need both"
- **Scalability:** "Build monitoring to prevent future occurrences"

#### **Troubleshooting Protocol:**

1. **Immediate:** Check data refresh, gateway status, query performance
2. **Workaround:** Manual refresh or cached data if needed
3. **Root Cause:** Query timeout? Data volume spike? Schema change?
4. **Prevention:** Implement alerting, performance baselines

### **3. ENGAGEMENT TECHNIQUES**

- **Check-in:** "Mickey, what failure patterns have you observed in the current implementation?"
- **Depth Offering:** "I can share my incident response playbook"
- **Team Mention:** "Geoffrey's ITIL experience would help formalize our incident management"

### **4. PRESSURE RESPONSE LAYER**

- **Technical Detail:** "Check Performance Analyzer, DAX Studio for query plans, Snowflake query history"
- **Alternative:** "If Power BI Service issue, could temporarily use Paginated Reports"
- **Lesson:** "At Trulieve, comprehensive logging saved us during critical failures"

### **5. ANSWER HIGHLIGHTS**

- **Power Words:** SYSTEMATIC, TRIAGE, ROOT-CAUSE, PREVENTION, RESILIENCE
- **Key Metrics:** 99.9% uptime, \$520K saved, zero failures
- **Closing Transition:** "Every incident is a learning opportunity to build better resilience"
- **Energy Level:** 9/10
- **Pause Point:** After "downtime isn't an option"

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## **Q7: Stakeholder Management with Conflicting Priorities**

**QUESTION:** "How do you manage analytics requests from 8 different company presidents with competing priorities?"

**COMPETENCY:** Stakeholder Alignment & Prioritization

**LIKELY ASKER:** Bob Toupin (Executive/Strategic)

### **1. STRATEGIC FRAMING (10 seconds)**

- **Acknowledgment:** "Eight presidents means eight P&Ls, eight strategies, but one ICT vision."



- **Context Bridge:** "This is where governance and transparent prioritization become critical."
- **Thesis Statement:** "I use data to prioritize data requests - ROI drives the roadmap."

## 2. STRUCTURED RESPONSE (60-90 seconds)

### BEHAVIORAL Approach:

- **Selected STAR:** Working with Trulieve CEO and multiple state VPs
- **Key Metrics:** Achieved buy-in from all stakeholders within 60 days
- **Stakeholder Impact:** Unified reporting despite competing state priorities
- **Learning Element:** "Quick wins for everyone builds coalition for bigger changes"

### Prioritization Framework:

1. **Value/Effort Matrix:** Plot all requests, tackle high-value/low-effort first
2. **Stakeholder Rounds:** Monthly 1-on-1s with each president
3. **Transparent Roadmap:** Published timeline visible to all
4. **Quick Win Distribution:** Ensure each president gets early victory

## 3. ENGAGEMENT TECHNIQUES

- **Check-in:** "Bob, how do you currently balance these competing demands?"
- **Depth Offering:** "I use a formal scoring model if you'd like to see it"
- **Team Mention:** "Mickey's relationships help understand unspoken priorities"

## 4. PRESSURE RESPONSE LAYER

- **Additional Detail:** "Scoring weights: Revenue impact 40%, Effort 30%, Strategic alignment 30%"
- **Alternative:** "Could establish rotating priority - each president gets a sprint"
- **Lesson:** "At Trulieve, we learned that transparency reduces political maneuvering"

## 5. ANSWER HIGHLIGHTS

- **Power Words:** GOVERNANCE, ROI-DRIVEN, TRANSPARENT, COALITION, UNIFIED
- **Key Metrics:** 8 presidents, 60-day alignment, monthly cadence
- **Closing Transition:** "Structured process removes emotion from prioritization"
- **Energy Level:** 7/10
- **Pause Point:** After "ROI drives the roadmap"

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## Q8: Data-Driven Decision Making Culture

**QUESTION:** "How would you foster a data-driven decision-making culture across our traditionally relationship-based business?"

**COMPETENCY:** Cultural Transformation

**LIKELY ASKER:** Bob Toupin (Executive/Strategic)

## 1. STRATEGIC FRAMING (10 seconds)

- **Acknowledgment:** "Transforming from handshake to analytics-driven is a journey I've led multiple times."
- **Context Bridge:** "Bob, this mirrors your BlueLinux transformation perfectly."
- **Thesis Statement:** "Success stories and peer pressure drive cultural change faster than mandates."

## 2. STRUCTURED RESPONSE (60-90 seconds)

### BEHAVIORAL Approach:

- **Selected STAR:** STAR 3 - Customer Segmentation driving \$2.4M impact
- **Key Metrics:** 12% customer acquisition improvement, \$2.4M revenue uplift
- **Stakeholder Impact:** Sales team went from intuition to data-backed targeting
- **Learning Element:** "Show money first, explain methodology second"

### Culture Change Strategy:

1. **Find the Believers:** Identify data-curious leaders in each company
2. **Create Success Stories:** Quote-to-close improvement = immediate win
3. **Peer Pressure:** Share wins in president meetings
4. **Embed in Process:** Make dashboards required for meetings

## 3. ENGAGEMENT TECHNIQUES

- **Check-in:** "What cultural barriers have you observed so far?"
- **Depth Offering:** "I have a culture change assessment we could deploy"
- **Team Mention:** "Geoffrey's change management experience from Deloitte would be valuable"

## 4. PRESSURE RESPONSE LAYER

- **Additional Detail:** "Gamification helps - leaderboards for forecast accuracy, adoption rates"
- **Alternative:** "Could mandate data reviews in operational meetings"
- **Lesson:** "At Home Depot, making data access easier than Excel drove adoption"

## 5. ANSWER HIGHLIGHTS

- **Power Words:** TRANSFORMATION, SUCCESS-STORIES, DATA-BACKED, PEER-PRESSURE, EMBED
- **Key Metrics:** \$2.4M impact, 12% improvement, 5 companies transformed

- **Closing Transition:** "Culture eats strategy - but success stories eat resistance"
  - **Energy Level:** 8/10
  - **Pause Point:** After "faster than mandates"
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## **Q9: Advanced Analytics/ESG Implementation**

**QUESTION:** "Beyond reporting, how would you implement advanced analytics or ESG metrics for our sustainability initiatives?"

**COMPETENCY:** Innovation & Advanced Analytics

**LIKELY ASKER:** Bob Toupin (Executive/Strategic)

### **1. STRATEGIC FRAMING (10 seconds)**

- **Acknowledgment:** "Advanced analytics is where competitive advantage lives - especially in data center cooling."
- **Context Bridge:** "With 75% of HVAC installations being energy-efficient, ESG metrics are business metrics."
- **Thesis Statement:** "I start with predictive maintenance, then expand to carbon optimization."

### **2. STRUCTURED RESPONSE (60-90 seconds)**

**TECHNICAL Approach:**

- **Methodology:** Machine learning for pattern recognition and prediction
- **Specific Example:** STAR 3 - ML segmentation generating \$2.4M
- **Trade-offs:** "Accuracy vs interpretability - start simple, increase sophistication"
- **Scalability:** "Cloud-based ML scales with data growth"

**Advanced Analytics Roadmap:**

1. **Predictive Maintenance:** IoT data predicting HVAC failures
2. **Energy Optimization:** ML optimizing cooling cycles
3. **Carbon Tracking:** Automated ESG reporting across portfolio
4. **Customer Intelligence:** Predict quote success probability

### **3. ENGAGEMENT TECHNIQUES**

- **Check-in:** "Have you explored the AI blueprint project's potential for other applications?"
- **Depth Offering:** "I can demonstrate specific algorithms for HVAC optimization"
- **Team Mention:** "The Azure infrastructure Bob mentioned supports this perfectly"

### **4. PRESSURE RESPONSE LAYER**

- **Technical Detail:** "Random Forest for failure prediction, time series for energy forecasting"

- **Alternative:** "Could start with rules-based analytics before ML"
- **Lesson:** "At Trulieve, simple clustering delivered more value than complex neural networks"

## 5. ANSWER HIGHLIGHTS

- **Power Words:** PREDICTIVE, OPTIMIZATION, ESG, MACHINE-LEARNING, COMPETITIVE-ADVANTAGE
  - **Key Metrics:** \$2.4M impact, 12% improvement, 16.4% market CAGR
  - **Closing Transition:** "Advanced analytics transforms ICT from vendor to strategic partner"
  - **Energy Level:** 8/10
  - **Pause Point:** After "business metrics"
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## Q10: Operational Analytics Development

**QUESTION:** "How would you develop operational analytics to improve our project execution and service delivery efficiency?"

**COMPETENCY:** Operational Excellence

**LIKELY ASKER:** Geoffrey Patton (Manager/Operational)

### 1. STRATEGIC FRAMING (10 seconds)

- **Acknowledgment:** "Operational analytics directly impacts your bottom line and customer satisfaction."
- **Context Bridge:** "With projects spanning months and complex BOMs, visibility is everything."
- **Thesis Statement:** "I focus on three areas: project profitability, resource utilization, and cycle time."

### 2. STRUCTURED RESPONSE (60-90 seconds)

**BEHAVIORAL Approach:**

- **Selected STAR:** STAR 4 - Supply Chain Analytics saving \$3.2M
- **Key Metrics:** 25% mis-ship reduction, 20+ hours saved weekly
- **Stakeholder Impact:** Field teams gained predictive visibility
- **Learning Element:** "Real-time alerts prevent problems; historical analysis prevents repetition"

**Operational Analytics Framework:**

1. **Project Profitability:** Quoted vs actual margin tracking
2. **Resource Optimization:** Technician utilization and routing
3. **Cycle Analytics:** Quote-to-close, order-to-delivery times

- 4. **Quality Metrics:** First-time fix rates, customer satisfaction

### 3. ENGAGEMENT TECHNIQUES

- **Check-in:** "Geoffrey, what operational metrics are most painful to track today?"
- **Depth Offering:** "I have templates for project margin variance analysis"
- **Team Mention:** "Your manufacturing experience would guide KPI selection"

### 4. PRESSURE RESPONSE LAYER

- **Additional Detail:** "Implement exception reporting - only surface variances over 5%"
- **Alternative:** "Could start with backward-looking analysis before real-time"
- **Lesson:** "At Home Depot, proactive alerts delivered 10x ROI versus reports"

### 5. ANSWER HIGHLIGHTS

- **Power Words:** PROFITABILITY, UTILIZATION, CYCLE-TIME, PROACTIVE, EFFICIENCY
  - **Key Metrics:** \$3.2M saved, 25% reduction, 20 hours weekly
  - **Closing Transition:** "Operational excellence becomes a competitive differentiator"
  - **Energy Level:** 7/10
  - **Pause Point:** After "visibility is everything"
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## Q11: Why ICT/Business Model Fit

**QUESTION:** "Why are you interested in ICT specifically, and how does our manufacturers' rep model align with your career goals?"

**COMPETENCY:** Motivation & Cultural Fit

**LIKELY ASKER:** Bob Toupin (Executive/Strategic)

### 1. STRATEGIC FRAMING (10 seconds)

- **Acknowledgment:** "ICT represents the perfect intersection of my experience and passion."
- **Context Bridge:** "Your PE-backed consolidation model is exactly where my skills create maximum value."
- **Thesis Statement:** "I thrive in high-growth, transformation environments where data drives competitive advantage."

### 2. STRUCTURED RESPONSE (60-90 seconds)

**CULTURAL Approach:**

- **Company Values Alignment:** Scrappy, collaborative, results-oriented
- **Collaboration Emphasis:** "Your player-coach model matches my leadership style perfectly"
- **Cultural Awareness:** "I understand the urgency of PE timelines from Trulieve"

## Why ICT Specifically:

1. **Greenfield Opportunity:** Building from scratch without legacy constraints
2. **Industry Growth:** 16.4% CAGR in data center cooling
3. **Leadership Team:** Bob's proven track record, newly assembled A-team
4. **Technical Challenge:** Snowflake + Power BI + multi-entity complexity

## 3. ENGAGEMENT TECHNIQUES

- **Check-in:** "The formation story from September 2024 is fascinating - what drove the timing?"
- **Depth Offering:** "I've researched your portfolio companies extensively"
- **Team Mention:** "The combination of experience you've assembled is impressive"

## 4. PRESSURE RESPONSE LAYER

- **Additional Detail:** "Your quote-to-close challenge alone could drive \$10M+ impact"
- **Alternative:** "Even considered how analytics could identify acquisition targets"
- **Lesson:** "PE environments taught me to balance speed with sustainability"

## 5. ANSWER HIGHLIGHTS

- **Power Words:** TRANSFORMATION, PE-BACKED, GREENFIELD, HIGH-GROWTH, COMPETITIVE-ADVANTAGE
  - **Key Metrics:** 16.4% CAGR, 11 companies, \$10M opportunity
  - **Closing Transition:** "I'm not just looking for a job - I'm looking for impact"
  - **Energy Level:** 9/10
  - **Pause Point:** After "maximum value"
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## Q12: Collaboration and Setting Standards

**QUESTION:** "How would you work with Mickey to improve our current Power BI implementation while establishing new standards?"

**COMPETENCY:** Collaboration & Team Dynamics

**LIKELY ASKER:** Mickey Williams (Technical Expert)

### 1. STRATEGIC FRAMING (10 seconds)

- **Acknowledgment:** "Mickey, your 25 years of BI experience provides invaluable foundation to build upon."
- **Context Bridge:** "Combining your Power BI expertise with Snowflake capabilities unlocks new possibilities."
- **Thesis Statement:** "I believe in collaborative evolution, not disruptive revolution."

## 2. STRUCTURED RESPONSE (60-90 seconds)

### COLLABORATIVE Approach:

- **Existing Work Value:** "Your current dashboards provide the starting point"
- **Enhancement Strategy:** "We optimize what exists while building what's missing"
- **Partnership Approach:** "Paired development ensures knowledge transfer both ways"
- **Knowledge Sharing:** "I learn your business context, you learn Snowflake patterns"

### Collaboration Framework:

1. **Assessment:** Review current implementation together
2. **Enhancement:** Optimize existing reports for performance
3. **Standards Development:** Co-create development guidelines
4. **Knowledge Exchange:** Weekly technical sessions

## 3. ENGAGEMENT TECHNIQUES

- **Check-in:** "What aspects of the current implementation are you most proud of?"
- **Depth Offering:** "I'd love to see your DAX patterns - might teach me new approaches"
- **Team Mention:** "Geoffrey could help document our standards for future team members"

## 4. PRESSURE RESPONSE LAYER

- **Additional Detail:** "We could establish code reviews for quality assurance"
- **Alternative:** "If you prefer independence, we could divide ownership areas"
- **Lesson:** "Best implementations combine multiple perspectives"

## 5. ANSWER HIGHLIGHTS

- **Power Words:** COLLABORATIVE, FOUNDATION, OPTIMIZE, PAIRED-DEVELOPMENT, CO-CREATE
- **Key Metrics:** 25 years experience, 50% faster together, weekly sessions
- **Closing Transition:** "Together we'll achieve what neither could alone"
- **Energy Level:** 7/10
- **Pause Point:** After "not disruptive revolution"

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## Panel-Specific Strategic Notes

### For Bob Toupin (CIO)

- Always reference his BlueLinx success and PE experience
- Emphasize speed of execution and ROI
- Show understanding of the urgency (6-8 hours daily in Power BI)

- Energy: 8-9/10 for strategic questions

### **For Geoffrey Patton (IT Manager)**

- Acknowledge his Oracle and manufacturing expertise
- Focus on process and project management aspects
- Emphasize collaboration and knowledge sharing
- Energy: 7-8/10 for operational questions

### **For Mickey Williams (Power BI Contractor)**

- Always credit his existing work first
- Position yourself as enhancement partner, not replacement
- Show genuine interest in his experience
- Energy: 7/10 for technical questions, avoid appearing threatening

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## **Universal Recovery Phrases**

**If caught off-guard:** "That's an excellent question that touches on several important aspects. Let me address the core issue first..."

**If question is unclear:** "I want to make sure I'm addressing your real concern here. Are you asking about [interpretation A] or [interpretation B]?"

**If technical knowledge gap:** "I haven't encountered that specific scenario, but based on similar challenges with [related technology], I would approach it by..."

**Bridge to strength:** "While that's not my exact experience, what I have done successfully is..."

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## **Closing Power Statement**

"This conversation has confirmed that ICT is exactly where I can deliver maximum impact. You need someone who can accelerate your Snowflake implementation, optimize Power BI performance, and unify analytics across 11 companies. I've done each of these separately - now I'm ready to do them together for ICT."