© ICT FINAL PANEL INTERVIEW BATTLE PLAN

The standard of the standard

MISSION-CRITICAL INTEL - KNOW YOUR PANEL

- BOB TOUPIN (CIO/VP IT) Your Champion
- Pain Points:
 - Spending 6-8 hours daily in Power BI Desktop (contractor failing)
 - No SQL access, using Co-Pilot to learn Power BI
 - 4-5 months into implementation with minimal progress

Lis Wins:

- BlueLinx: 30% IT cost reduction, 70bps margin lift
- Jackson Healthcare: 15-month WorkDay across 16 companies
- 6 consecutive years record EBITDA growth
- What He Wants: Power BI to be "mission-critical phones ringing if it goes down"

GEOFFREY PATTON (IT Solution Manager) - Your Ally

Strengths:

- Oracle Cloud certified (2018, 2020)
- Manufacturing background (Nucor Steel)
- Just joined February 2025 (building new team with you)
- Collaboration Opportunity: Change management expertise from Deloitte

MICKEY WILLIAMS (Power BI Contractor) - Handle with Care

ICT'S BURNING PLATFORM - YOUR OPPORTUNITY

Critical Gaps You Fill

Problem	Impact	Your Solution
ZERO Snowflake expertise	Project stalled	Turner 2018 pioneer
● 19% Quote-to-Close	Missing millions	Target 25% = \$10M+
11 companies, no unified KPIs	Can't measure success	Multi-entity expert
Manual Excel processes	8 presidents flying blind	50% automation proven

Market Tailwinds

- > Data center cooling: **16.4% CAGR** (\$22B → \$56B by 2030)
- S PE backing: Ardian (2023) + Platinum Equity (2025)

OPENING STATEMENT (90 seconds)

- "Thank you for having me. I know time is valuable, especially with Bob spending 6-8 hours daily in Power BI Desktop, so let me be direct about why I'm here.
- I'm a data analytics leader who transforms chaos into clarity. Over 8 years, I've generated \$7.1 million in measurable impact through analytics from pioneering Snowflake migrations when nobody knew the platform, to building Power BI from scratch at PE-backed companies.
- Three things make me uniquely qualified for ICT: First, I've been working with Snowflake since 2018 I can fill your expertise gap immediately. Second, I've unified analytics across multi-state operations at Trulieve, exactly like your 11-company challenge. Third, I understand PE urgency at Trulieve, we had quarters, not years, to show ROI.
- ✓ I see ICT's opportunity clearly: Your quote-to-close at 19% should be 25% that's millions on the table. Your 8 presidents need unified KPIs yesterday. And with data center cooling growing 16% annually, you need analytics that scale. I'm here to deliver all three."

L POWER STAR STORIES - EXPANDED VERSIONS

🙀 STAR 1: Power BI Platform from Zero (Trulieve)

2-Minute Version:

"Picture this: PE-backed cannabis company, CEO literally pacing the office waiting for weekold spreadsheets while making million-dollar inventory decisions hourly. Arizona operations had zero unified visibility.

I orchestrated the complete transformation. Started with CEO requirements sessions - he was refreshingly direct. Built data pipeline from SAP HANA, engineered star-schema for scale. Personally constructed 10+ executive dashboards focusing on revenue trends, inventory turnover, discount optimization.

Impact: Slashed manual reporting 50%, saved 10+ hours weekly, drove 5% sales increase, 15% fewer stock-outs. This became the template for Florida operations. The CEO called it transformational - and remembered at bonus time."

Key Metrics:

- § 5% sales increase (\$2M+ impact)
- 15% stockout reduction
- 10+ dashboards delivered

✓ ICT Connection: "Bob, this is exactly what ICT needs - from Excel chaos to mission-critical Power BI"

STAR 2: Snowflake Pioneer (Turner Broadcasting 2018)

2-Minute Version:

"2018, Turner Broadcasting. Leadership saw Snowflake demo, loved the \$2M savings potential. Problem? Nobody on our team had touched it. Documentation looked like ancient Greek. Nielsen viewing data for major networks depended on this migration.

I immersed myself completely - became our de facto expert in 30 days. Redesigned entire ETL architecture, wrote Python scripts modernizing decade-old processes. The old SSRS system groaned under terabytes; Snowflake handled it like a sports car.

Results: Processing time down 30%, infrastructure costs dropped 40%, report latency vanished 40%. More importantly, I trained the entire team in 60 days. They're still using my documentation today."

Key Metrics:

- ¾ 40% cost reduction (\$800K+ annually)
- 5 30% performance improvement
- 1 5 team members trained
- 👺 Created training documentation still in use

✓ ICT Connection: "This is EXACTLY your situation - zero Snowflake expertise, need immediate impact"

STAR 3: ML Customer Segmentation (\$2.4M Impact)

90-Second Version:

"Trulieve had millions in transaction data, zero insights. Marketing was spraying budget hoping something stuck. PE investors demanding growth.

I applied K-Means clustering and hierarchical algorithms to segment customers. Created personas: 'High-Value Regulars,' 'Discount Hunters,' 'Premium Seekers.' Presented to

leadership with clear action plans.

Results: Customer acquisition up 12% quarterly, revenue climbed \$2.4M, inventory waste down 20%. Bob, this mirrors your BlueLinx customer analytics success - same principles, massive impact."

Key Metrics:

- 🛂 \$2.4M revenue uplift
- 12% customer acquisition improvement
- 20% waste reduction
- 💇 3 actionable personas created

STANTICIPATED Q&A - POWER RESPONSES

? "How would you standardize KPIs across 11 companies?"

- ★ Hook: "This is the cornerstone challenge exactly what I solved at Trulieve across states."
- Framework:
 - 1. Weeks 1-2: Discovery mapping (Syspro vs Sage differences)
 - 2. Week 3: Stakeholder workshops with 8 presidents
 - 3. Weeks 4-8: Snowflake semantic layer build
 - 4. Ongoing: Governance council establishment
- Proof: "At Trulieve, achieved 50% reporting reduction, unified view in 60 days"

"Your approach to fixing our Power BI implementation?"

- **Hook**: "Bob, I understand you're spending 6-8 hours daily on this let's fix that immediately."
- 30-Day Sprint:
 - Week 1: Stabilize Mickey's work, fix performance issues
 - Week 2: Build Quote-to-Close dashboard (immediate value)
 - Week 3: Deploy to 2 pilot companies
 - Week 4: Document and train team
- Proof: "I've delivered first dashboards in 3 weeks at every company"

? "How handle resistant stakeholders?"

- **Hook**: "8 presidents means 8 P&Ls, but ONE ICT vision. I use data to prioritize data requests."
- 🔧 Approach:
- Value/Effort matrix (transparent prioritization)
- Quick win for each president (build coalition)
- Monthly 1-on-1s (maintain alignment)

- · Success story sharing (peer pressure)
- Proof: "Achieved buy-in from all Trulieve state VPs in 60 days"

? "Why ICT specifically?"

▶ Perfect Storm Response: "Three reasons: First, you need Snowflake expertise NOW - I've been doing it since 2018. Second, your multi-entity challenge is exactly what I solved at Trulieve. Third, the data center cooling opportunity at 16% CAGR combined with your PE backing creates a once-in-a-career transformation opportunity. Plus, Bob's track record shows ICT values data-driven transformation - that's my DNA."

30-60-90 DAY DETAILED COMMITMENTS

| FIRST 30 DAYS - Quick Wins & Foundation

✓ Week 1:

- Stabilize Power BI performance issues
- · Document current state assessment
- Meet all 8 portfolio presidents

Week 2-3:

- Launch Quote-to-Close dashboard V1
- · Begin Snowflake environment setup
- Establish data governance committee

Week 4:

- Deploy dashboard to 3 pilot companies
- · Complete team skills assessment
- Present 90-day roadmap to Bob
- **Deliverable**: Working Quote-to-Close dashboard showing path to 25% conversion

DAYS 31-60 - Scale & Standardize

- Build 5 unified KPI dashboards
- Complete Snowflake data warehouse architecture
- ▼ Train team on Snowflake basics (eliminate expertise gap)
- Onboard 5 of 8 portfolio companies
- Implement automated data pipelines
- © Deliverable: Unified executive dashboard across portfolio
- 📅 DAYS 61-90 Transform & Optimize

- All 8 presidents actively using dashboards
- Advanced analytics pilot (predictive maintenance)
- Power BI at "mission-critical" status
- Team self-sufficient on Snowflake
- Document \$1M+ in identified opportunities
- Deliverable: ICT transformed from "Excel company" to "analytics company"

STRATEGIC QUESTIONS TO ASK

For Bob (Strategic/Visionary)

- 1. I Given your 70 basis points margin improvement at BlueLinx through customer analytics, which ICT customer segments do you see as the highest priority for similar analysis?"
- 2. # "With the AI blueprint project at 70% completion, how do you envision integrating that automation with our analytics platform?"
- 3. S "What specific ROI metrics will Ardian and Platinum Equity be looking for in the first 90 days?"

For Geoffrey (Operational/Process)

- 1. \ship "With your Oracle expertise and our Syspro/Sage environment, what integration patterns have you found most effective?"
- 2. What change management lessons from your BeyondTrust transformation would apply to ICT's analytics rollout?"
- 3. "How can we best leverage your manufacturing background for operational KPI selection?"

For Mickey (Technical/Collaborative)

- 1. What specific Power BI challenges have you encountered that Snowflake could help solve?"
- 2. Which data models are working well that we should preserve and enhance?"
- 3. "What's your vision for the ideal Power BI architecture at ICT?"

🎀 For Full Panel (Cultural/Strategic)

- 1. \(\subseteq \) "With 8 portfolio company presidents, what's been the key to getting initiatives adopted across all companies?"
- 2. Significant "Given data center cooling's 16.4% CAGR and liquid cooling at 21.6%, should we be planning for IoT sensor integration?"
- 3. "What would make this role wildly successful in your eyes after 12 months?"

CLOSING STATEMENT (Memorize This!)

"Bob, Geoffrey, Mickey - this conversation has crystallized something important. ICT has assembled all the right pieces: Bob's proven transformation playbook from BlueLinx, Geoffrey's systems integration expertise, Mickey's Power BI foundation. What you need now is the catalyst to accelerate everything.

I bring three critical capabilities: First, I'll immediately fill your Snowflake gap - I've been doing this since 2018 when nobody knew the platform. Second, I'll transform that 19% quote-to-close to 25% - that's \$10 million waiting to be captured. Third, I'll unify your analytics across 11 companies - I've done this exact consolidation at Trulieve.

In 90 days, you'll have Power BI at mission-critical status - Bob won't be spending 6 hours daily in Desktop. Snowflake will be enabling real-time cross-portfolio analytics. And those 8 presidents will have unified KPIs driving decisions.

L'm not here to interview - I'm here to solve your problems. I can start immediately, even part-time while we finalize details. What questions can I answer to confirm I'm the person to accelerate ICT's transformation?"

→ QUICK REFERENCE CARDS

limite Energy Management

- **Bob Questions**: 8-9/10 (match his urgency)
- **Geoffrey Questions**: 7-8/10 (collaborative tone)
- Mickey Questions: 7/10 (respectful, non-threatening)
- **Opening**: 7/10 (confident but warm)
- STAR Stories: 8-9/10 (peak energy)
- **Closing**: 9-10/10 (leave strong impression)

Power Phrases to Drop

- "Building on Mickey's foundation..."
- Isimilar to your BlueLinx transformation..."
- Geoffrey's Oracle expertise would be perfect for..."
- In PE environments, speed matters..."
- In the state of th
- **©** "Making Power BI mission-critical..."
- # "Snowflake changes everything..."

X Recovery Protocols

If Stumped: "Excellent question - let me think about that properly... [pause]... Actually, this connects to my experience at..."

If Technical Gap: "I haven't used that specific feature, but I've solved similar challenges with [adjacent tech]. Tell me more about your use case..."

If Disagreement: "That's interesting and different from my experience - help me understand your context better..."

If Pressed on Weakness: "My biggest learning was at Turner when I underestimated change management. Now I always start with stakeholder mapping. It's become fundamental to my approach."

🦠 Visual Aids (If Screen Sharing)

- II Financial Well-Being Dashboard (demo ready)
- <a> Insurance Analytics Dashboard (backup)
- \(\) 30-60-90 day plan (one-pager)
- Snowflake architecture diagram (if asked)

Ned Flags - AVOID

- X Don't criticize Mickey's work
- X Don't talk more than 2 minutes per answer
- X Don't forget PE timeline urgency
- X Don't be overly technical with Bob
- X Don't mention salary unless asked
- X Don't say "I don't know" without bridging

☑ Green Flags - EMPHASIZE

- ✓ \$7.1M in proven impact
- ✓ Snowflake since 2018 (only expert)
- ✓ PE experience (understand urgency)
- ✓ Builder mentality (not just reporter)
- ✓ Multi-entity expertise (11 companies)
- ✓ Quick wins focus (Quote-to-Close)

If Bob Gets Technical (He's Using Co-Pilot)

If he shows you his Power BI work:

"Bob, I can see you've made solid progress here. The issue isn't your logic - it's that without Snowflake doing the heavy lifting, Power BI is trying to be both the engine AND the car. Let me show you how Snowflake changes this..."

If he asks about specific DAX formulas:

"That's exactly where many people get stuck. Instead of complex DAX, we can push that logic to Snowflake views. For example, your quote-to-close calculation becomes a simple SUM in Power BI because Snowflake handles the business logic."

If he mentions performance problems:

"I see this constantly - Power BI Desktop hitting memory limits. Three immediate fixes: First, implement incremental refresh. Second, use DirectQuery for large facts. Third, Snowflake aggregations so Power BI only pulls summaries."

If he's frustrated with the contractor:

"It sounds like Mickey's been working in isolation. My approach is collaborative - daily standups, shared documentation, and knowledge transfer. You shouldn't need Co-Pilot after my first month."

FINAL PRACTICAL PREP - LAST MINUTE REMINDERS

What to Have Ready

- V Phone/Laptop: Portfolio site (brandon-abbott.com) loaded
- **V** Notepad: For taking notes (shows engagement)
- **Questions Written**: Your strategic questions visible
- Water: Stay hydrated, speak clearly
- V LinkedIn: All three profiles pulled up for reference

If They Ask About Compensation

"I'm confident we'll find mutual agreement. Based on market rates and the value I bring - particularly filling your Snowflake gap immediately - I'm targeting the upper end of your range. But what's most important is the opportunity to transform ICT's analytics. What did you have budgeted?"

If They Ask About Other Opportunities

"I'm selective about opportunities - I only pursue roles where I can make significant impact. I have conversations in progress, but ICT is my top choice because of the Snowflake greenfield opportunity and the caliber of leadership team you've assembled. The timeline for my decision is within the next week."

😼 Body Language Power Moves

- Opening: Firm handshake, eye contact with each person
- Sitting: Lean slightly forward (engagement)
- Listening: Nod, take occasional notes
- Speaking: Open palms, controlled gestures

• Closing: Stand first, initiate handshakes

Time Management

• Your Answers: 60-90 seconds typical, 2 minutes max

• STAR Stories: 90-120 seconds with metrics

• Questions: Save 10 minutes at end

If Running Long: "I want to be respectful of time..."

Power Start (First 30 Seconds)

"Bob, Geoffrey, Mickey - thanks for having me. I know we have a lot to cover, and Bob, I understand you're spending significant time in Power BI Desktop daily, so I'm ready to dive into how I can immediately help with that."

o The "Any Other Questions?" Response

"Just one - given everything we've discussed, what hesitations, if any, do you have about my fit for this role? I'd love to address those directly."

Follow-Up Already Planned

Within 2 hours, send personalized emails:

- Bob: Reference Snowflake solution + BlueLinx parallel
- Geoffrey: Mention collaboration on Oracle integration
- Mickey: Appreciate his Power BI foundation, excited to enhance
- Attach: 30-60-90 day plan PDF

if They Offer a Tour

- Accept enthusiastically
- Ask about team locations
- V Comment on workspace energy
- V Thank whoever guides you

Last Minute Confidence Boosters

- You pioneered Snowflake when nobody knew it
- You've generated \$7.1M in measurable impact
- You've solved their EXACT problem before
- They have ZERO Snowflake expertise
- You're interviewing them too

Nuclear Option (If Needed)

"I understand you need someone immediately. I could potentially start part-time or on a consulting basis while we finalize full-time details. The quote-to-close analysis alone could be done in my first week."

TECHNICAL VALUE DEMONSTRATION - SNOWFLAKE + POWER BI

Snowflake Game-Changers for ICT

1. Virtual Warehouses (Solve Bob's Performance Issues)

Current Problem: Single Power BI capacity hitting limits

Snowflake Solution: Spin up warehouses per company/use case

Example: "Bob, we can have a dedicated warehouse for quote-to-close analytics that auto-scales during month-end without affecting daily ops"

2. Zero-Copy Clones (Mickey's Testing Paradise)

Current Problem: Can't test without affecting production

Snowflake Solution: Instant production clones for development

Example: "Mickey, you could test any change on real data in seconds

without any risk or storage cost"

3. Time Travel (Eliminate Report Discrepancies)

Current Problem: "Why don't these numbers match yesterday's?"

Snowflake Solution: Query data as of any point in past 90 days

Example: "We can show exact data state when any report was generated"

4. Secure Data Sharing (Multi-Company Magic)

Current Problem: 11 companies, separate databases

Snowflake Solution: Share data without copying or moving

Example: "Each president sees only their data, but we query everything once"

Power BI + Snowflake Technical Wins

Performance Optimizations

Current Pain	Snowflake Solution	Impact
Slow refresh (hours)	Incremental refresh + Streams	Minutes
Memory errors	DirectQuery with materialized views	Unlimited scale
Timeout issues	Result caching + clustering	Sub-second
Concurrency limits	Multi-cluster warehouses	Unlimited users

o Architecture Patterns to Propose

Composite Model Strategy (Best of both worlds):

```
Import Mode: Dimension tables (companies, products, dates)
DirectQuery: Fact tables (transactions, quotes)
Benefit: Fast filters with real-time transactional data
```

Aggregation Strategy (For Bob's executives):

```
Detail Level: Snowflake (billions of rows)

Aggregated: Power BI (thousands of rows)

Automatic: Power BI routes queries intelligently
```

Technical Concepts to Drop Casually

When Mickey asks about data modeling:

"I'd implement a **Snowflake Data Vault 2.0** pattern with raw vault, business vault, and information marts. This gives us history tracking for the quote-to-close analysis while maintaining **SCD Type 2** for customer dimensions."

When Bob asks about performance:

"We'll use **Snowflake's automatic clustering** on quote_date and company_id, combined with **Power BI's aggregation awareness**. Plus, **result set caching** means identical queries return instantly."

When Geoffrey asks about integration:

"Snowflake's VARIANT data type can ingest Syspro and Sage data in native formats, then we'll use lateral flatten to normalize. For Power BI, we'll leverage native Snowflake connector with OAuth for security."

Quick Architecture Sketch (If whiteboarding)

```
[Syspro] [Sage] [CRMs] [Excel]

↓ (Talend)

[RAW LAYER - Snowflake]

↓ (SQL/Tasks)

[STAGING LAYER - Cleaned]

↓ (Views)

[SEMANTIC LAYER - Star Schema]

↓ (Native Connector)

[Power BI - Composite Models]

↓

[8 Presidents] [Bob] [Ops Teams]
```

Killer Technical Solutions for ICT's Problems

Problem: Quote-to-Close Analysis Across Systems

Your Solution:

"I'll create a Snowflake **SECURE VIEW** that unions quote data from all systems with companyspecific calculations. Power BI connects once, but **row-level security** ensures each president sees only their data. We can track quote aging with **window functions** and identify bottlenecks with **lag analysis**."

Problem: No Standardized KPIs

Your Solution:

"Snowflake INFORMATION_SCHEMA becomes our data dictionary. I'll build a semantic layer using database views with business-friendly names. Power BI measures reference these views, ensuring everyone uses the same calculations. Changes propagate instantly."

Problem: Manual Excel Processes

Your Solution:

"Snowflake **external stages** can read Excel files directly from SharePoint. We'll use **COPY INTO** with **error handling** to automate ingestion. Power BI **dataflows** can then refresh automatically. No more manual uploads."

Technical Quick Wins to Propose

Week 1 Quick Win:

"I'll implement **Snowflake query tagging** to track which Power BI reports consume most resources. This immediately shows us optimization opportunities."

Week 2 Quick Win:

"Set up **Snowflake resource monitors** to prevent runaway queries and alert on unusual usage patterns. No more surprise bills."

Week 3 Quick Win:

"Create **development/test environments using zero-copy clones**. Mickey can experiment without any risk."

Advanced Capabilities to Tease

For Bob (Strategic):

"Once we stabilize, Snowflake's **Snowpark** enables Python/Java directly in the warehouse. We could run the Al blueprint analysis where the data lives, no data movement."

For Geoffrey (Operational):

"Snowflake **streams and tasks** can trigger alerts when quote-to-close ratios drop below threshold. Proactive problem detection."

For Mickey (Technical):

"Power BI **incremental refresh** with Snowflake **change tracking** means we only process deltas. Refresh time drops 90%."

Security & Governance Benefits

Compliance Story:

"Snowflake is **SOC 2 Type II**, **HIPAA**, and **PCI-DSS** compliant. With **end-to-end encryption** and **RBAC**, we exceed PE audit requirements."

Data Lineage Story:

"Snowflake **access history** shows exactly who viewed what data when. Combined with Power BI **usage metrics**, we have complete audit trails."

If They Ask "Why Not Just Use Azure Synapse?"

"Great question! Three reasons: First, Snowflake's **consumption-based pricing** means we only pay for what we use - critical with 11 companies at different stages. Second, **zero-copy clones** and **time travel** don't exist in Synapse. Third, you've already chosen Snowflake - I'm here to maximize that investment, not restart the architecture debate."

Technical Elevator Pitch

"Snowflake isn't just a data warehouse - it's a **data cloud**. For ICT, this means your 11 companies can operate independently while sharing a unified analytics layer. Power BI becomes the window into this data, but Snowflake does the heavy lifting. Think of it as moving from 11 Excel files to one intelligent system that knows who should see what, when, and how fast they need it."

TINAL MINDSET

Remember: You're not hoping for this job - you're choosing to solve their problems. They need you more than you need them:

- They have ZERO Snowflake expertise
- · Bob is drowning in Power BI work
- \$10M+ is sitting on the table
- You're their ONLY solution

Walk in knowing: You've already won technically (91/100 score). This is about demonstrating leadership, vision, and cultural fit.

Your mantra: "I'm not interviewing - I'm consulting. I'm not hoping - I'm choosing. I'm not just qualified - I'm the solution."

SUCCESS INDICATORS

Watch for these buying signals:

- Bob stops talking about "if" and says "when"
- Geoffrey asks about collaboration specifics
- Mickey engages on technical details
- ✓ Discussion shifts to logistics/start date
- V They introduce you to others
- Variation
 Tour is offered
- They sell you on the company

POCKET CARD - LAST GLANCE BEFORE WALKING IN

OF YOUR 5 POWER FACTS

- 1. **\$7.1M** proven impact
- 2. Snowflake since 2018 (only expert)
- 3. 50% reporting reduction achieved
- 4. **19%** → **25%** quote-to-close = \$10M
- 5. **11 companies** unified (done before)

PREMEMBER THE PAIN

- Bob: 6-8 hrs/day in Power BI (rescue him)
- Geoffrey: New hire, needs partner (ally)
- Mickey: Underperforming (credit, don't replace)

THREE MUST-USE PHRASES

- 1. "Building on Mickey's foundation..."
- 2. "Similar to your BlueLinx success, Bob..."
- 3. "I can start immediately, even part-time"

♦ YOUR CLOSING (30 seconds)

"I bring three things: Snowflake expertise you don't have, Power BI building experience you need, and PE transformation speed you require. In 90 days: Power BI mission-critical, quote-to-close at 25%, unified KPIs across 11 companies. I'm ready to start immediately."

YOUR MINDSET

You're not interviewing. You're consulting. You're not hoping. You're choosing.

You're not qualified. You're the solution.

They have ZERO Snowflake expertise. You ARE their answer.

GO SHOW THEM WHY YOU'RE THE ONLY CHOICE! \mathscr{I}