

# STRATEGIC WORKSHOP

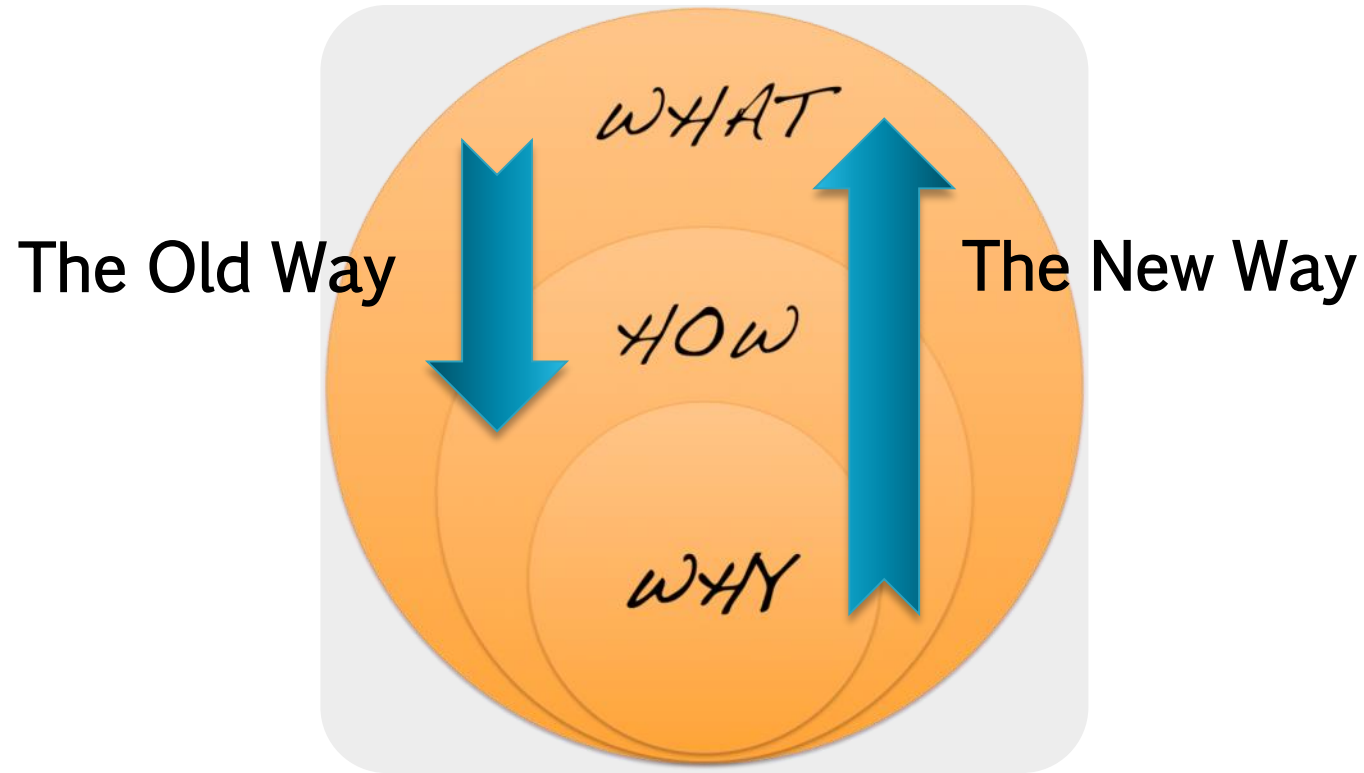


# Workshop Agenda

- Introductions
- Overview & Introductions
- “Why” Discussion
- TAM & SAM Target Market Discussion
- FAM Target Market Discussion
- SWOT Analysis Discussion
- Competitive Discussion
- FAM Targets Discussion
- GAP Discussion
- Neuromarketing Overview
- Prospect Profiling
  - Persona details, prospect drivers, search attributes, segment demographics, needs, behavior-based profiles
- Messaging
  - Brand messaging, R-Complex messaging, messaging houses/cubes, mission statement, tone & voice, unique selling propositions
- Marketing & Sales Enablement Asset Requirements
  - Asset map to Buyer’s Journey, asset list & content elements
- LinkedIn Sales Navigator Social Selling training, lead generation, engagement & nurturing
- Prospect Qualification and Scoring Matrix, lead nurturing, email drip campaigns
- CRM Integration
- Dynamic Sales Playbook
- Conclusion



# EXERCISE: Why?



3

We make iPhones.

2

Our products are elegant and easy to use.

1

We believe in challenging the status quo.

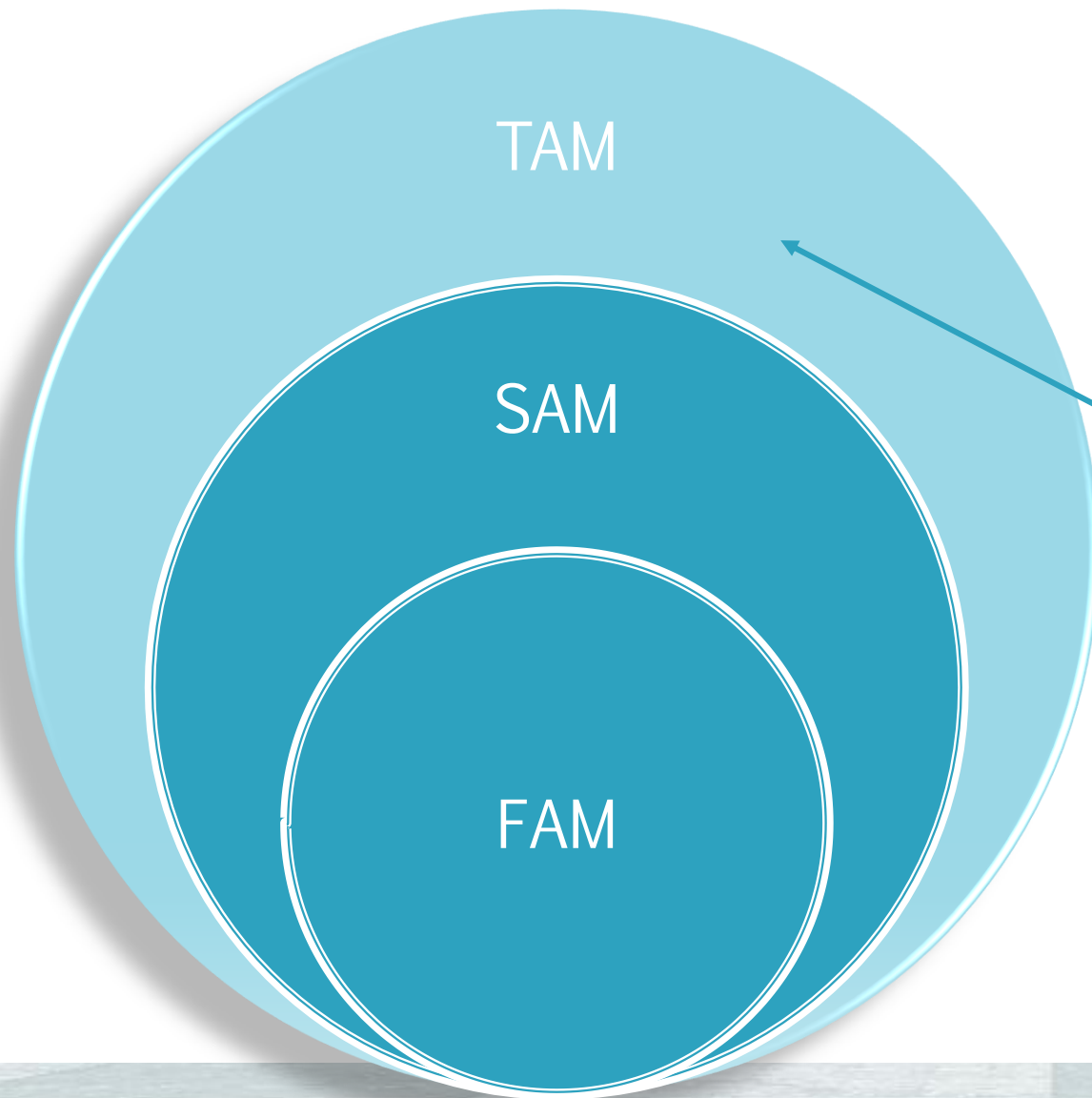
# ECHO's Why



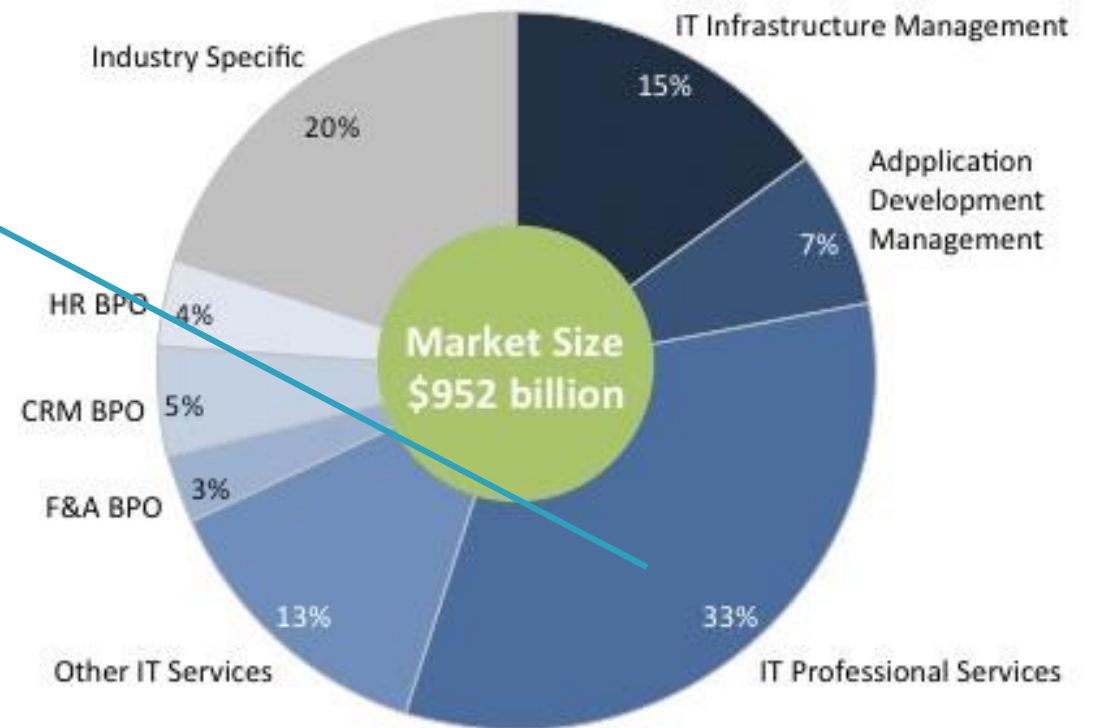
*“Echo Technology Solutions is passionate about helping you avoid risks and increase profits by instantly becoming or augmenting your information technology, security, or development team.*

*We do this by leveraging our proven, certified, and efficient business-centric experts to help your small to mid-sized firm lower costs, concerns, and complexities.”*

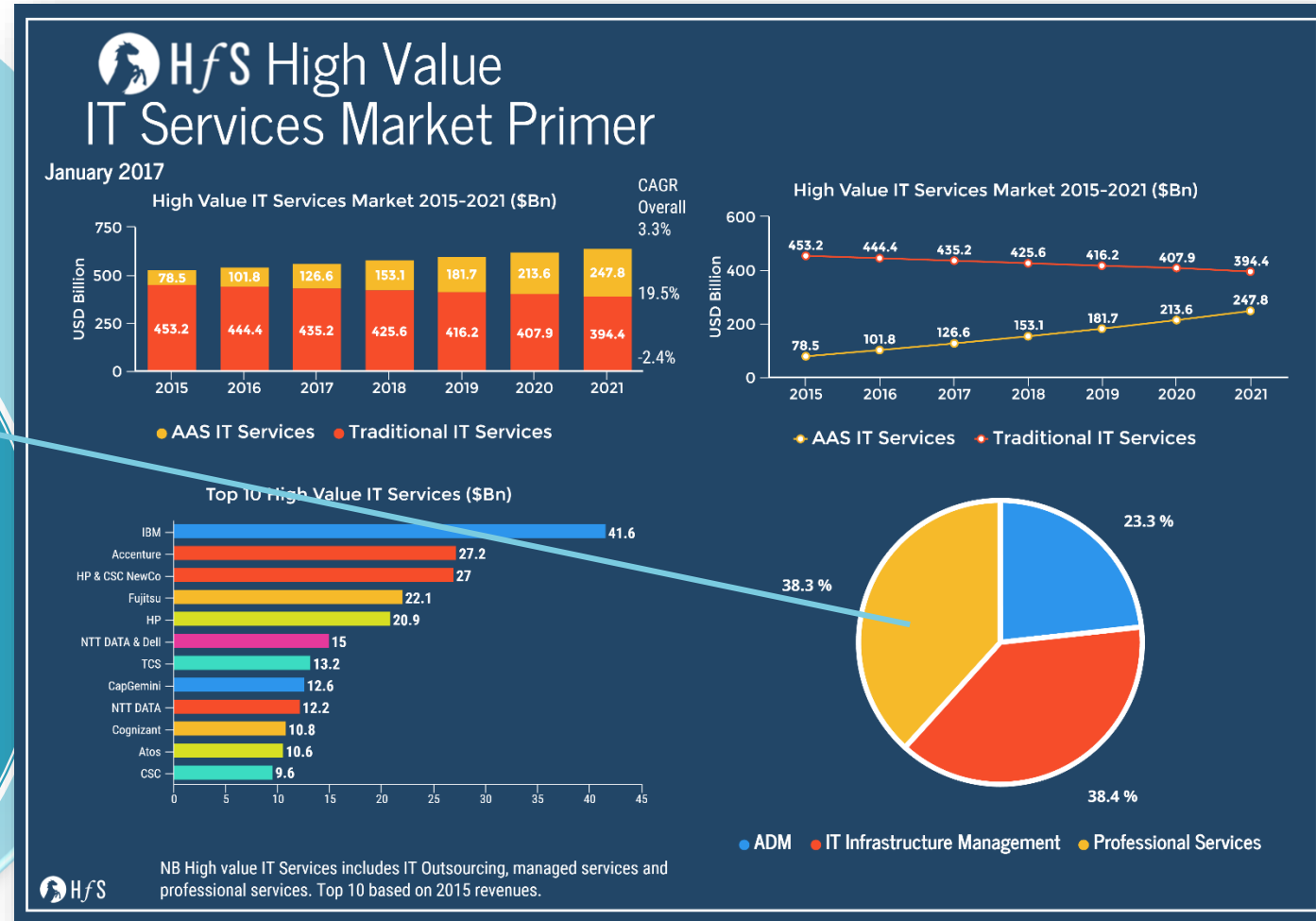
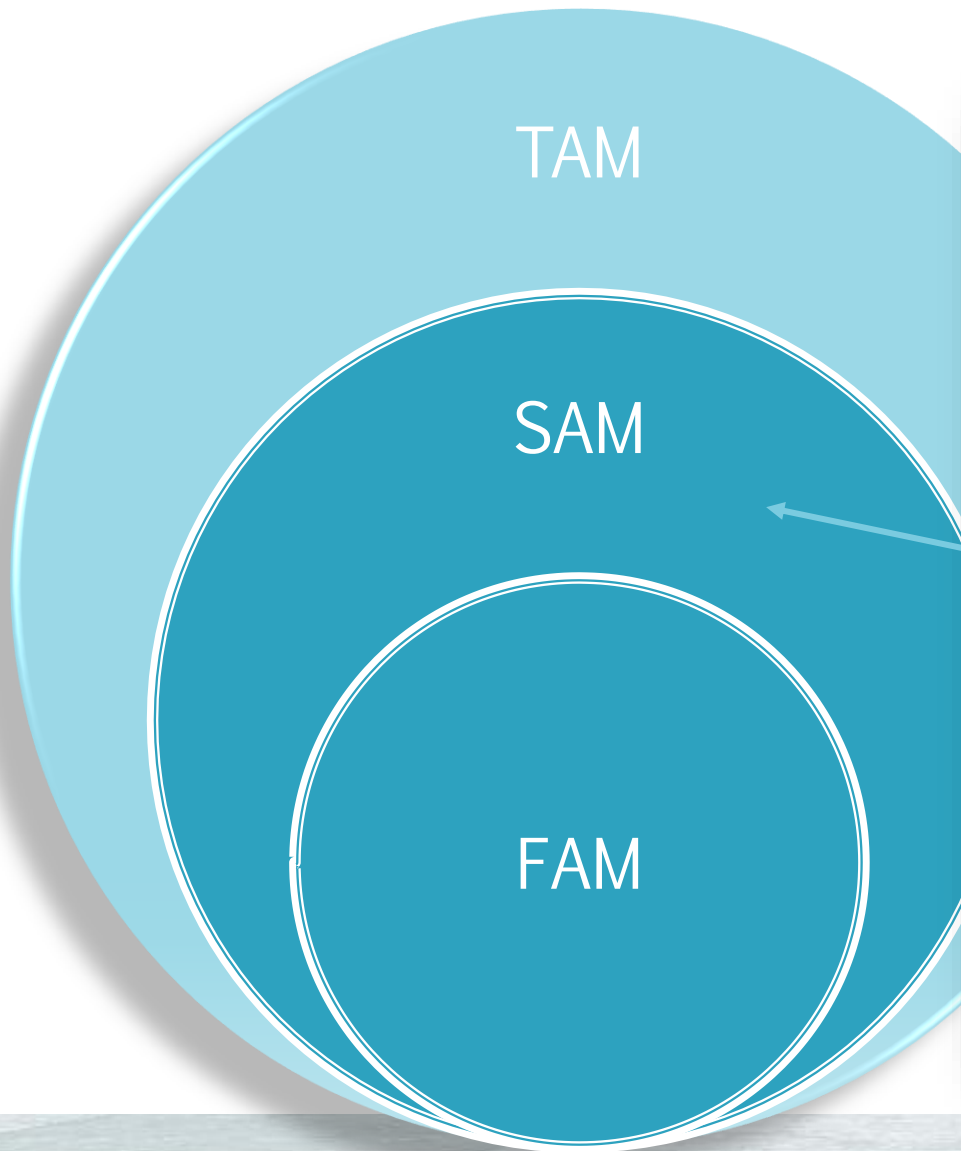
# EXERCISE: TAM



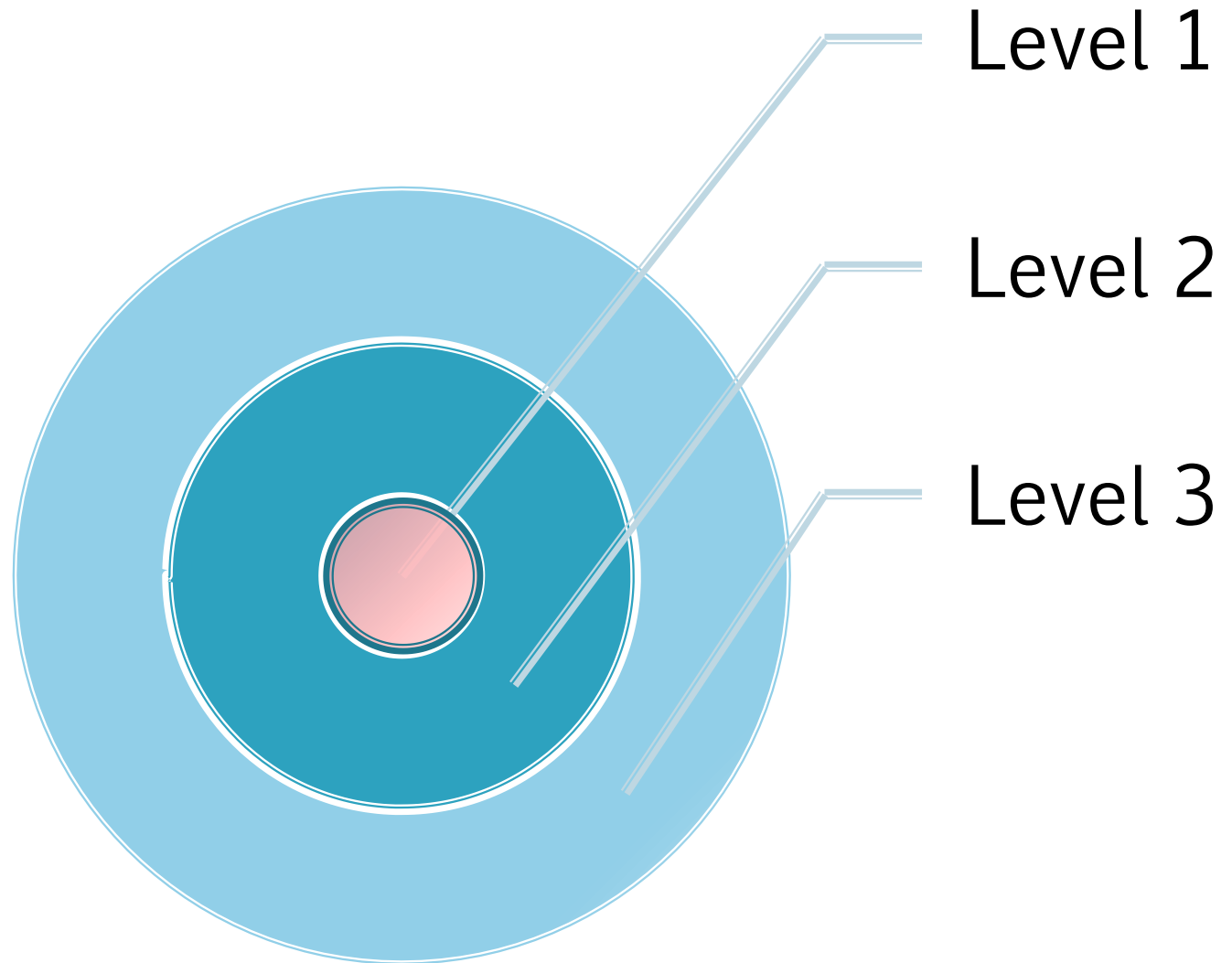
Global Size of the BPO and IT Outsourcing Market



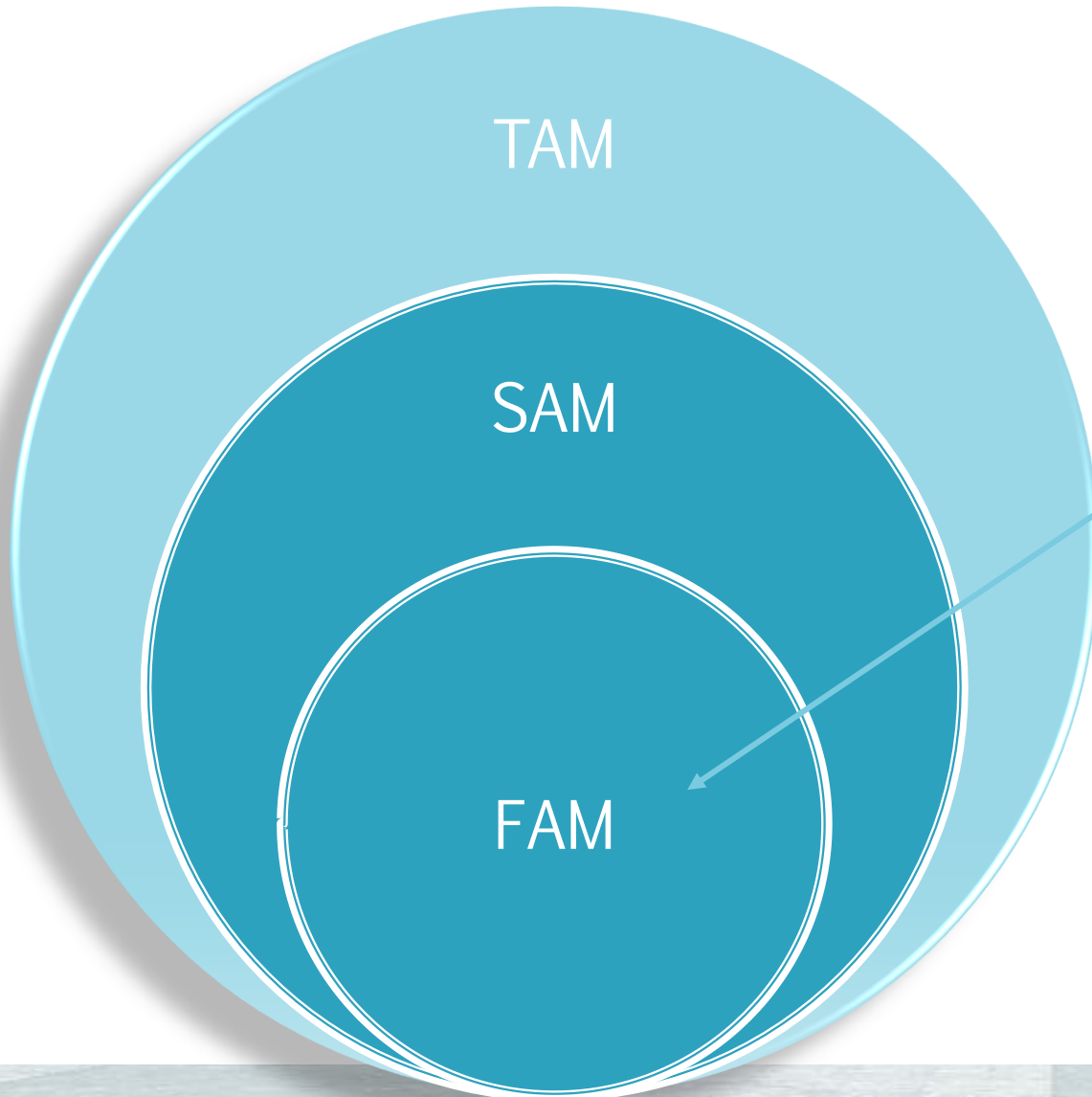
# EXERCISE: SAM



# EXERCISE: Focused Available Market



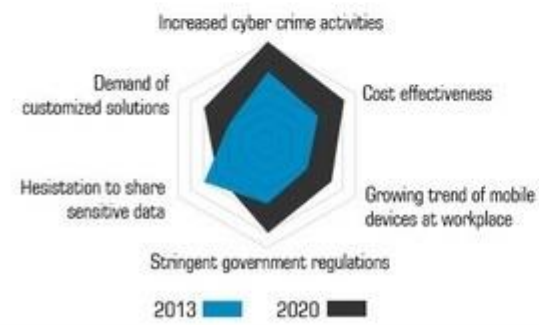
# EXERCISE: FAM-MSSP?



## Global Managed Security Services Market Size and Forecast (2013 - 2020)



### Global Managed Security Services Market: Top Impacting Factors



### Global Managed Security Services Market By Geography



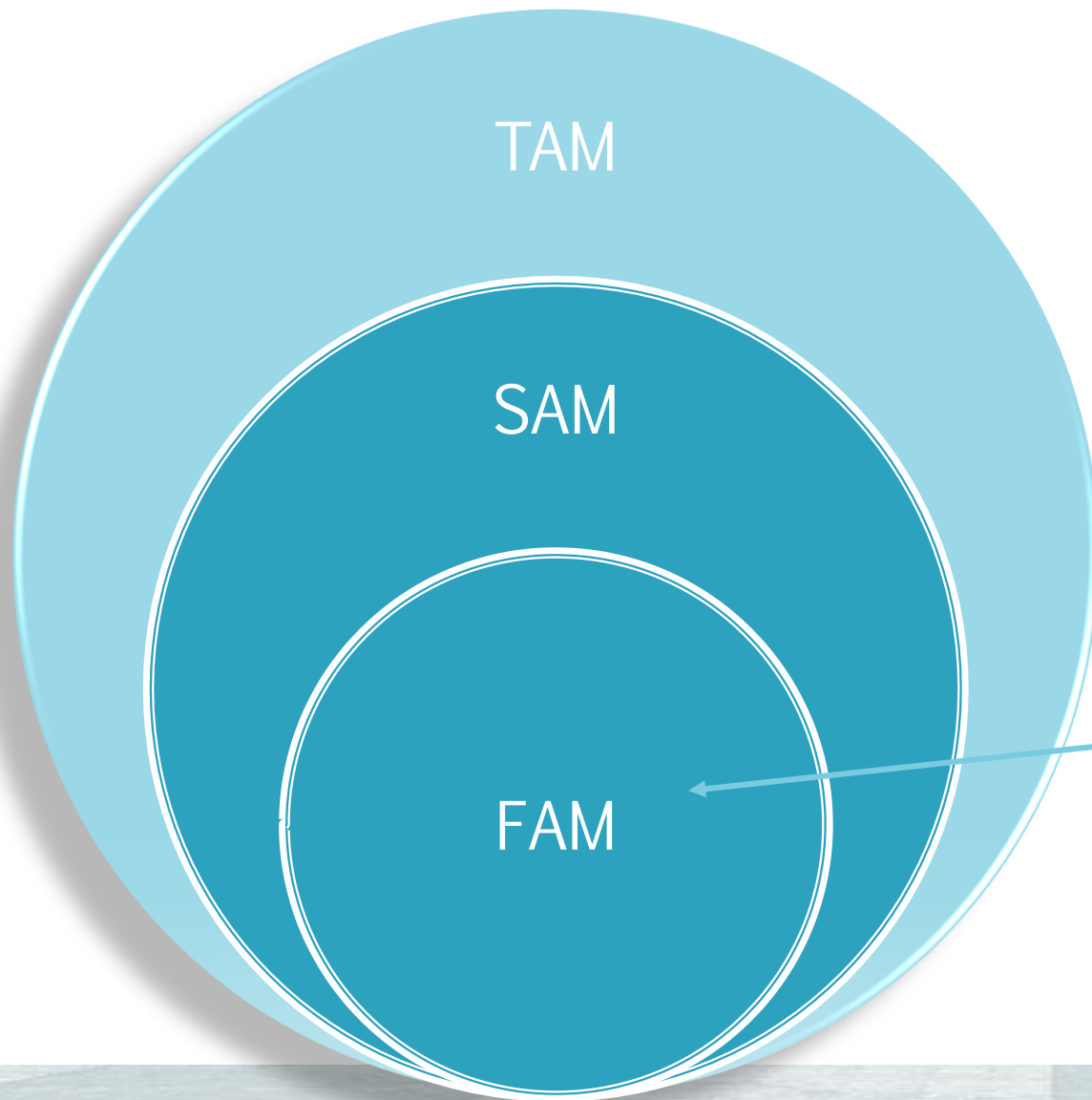
### Global Managed Security Services Market Dynamics

- Drivers:**
- Increasing cyber crime activities
  - Cost effectiveness
  - Stringent government regulations
  - Growing trend of mobile devices at workplace
  - Rise in electronic data
- Restraints:**
- Hesitation to share sensitive data
  - Demand of customized solutions

For More Details See Table of Contents

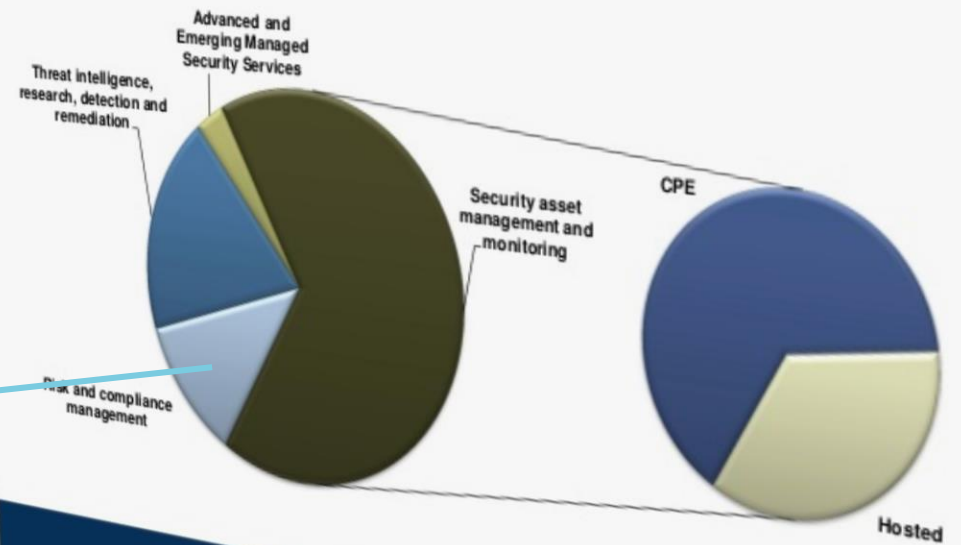


# EXERCISE: FAM-GRC?



What services are managed security service providers delivering to clients?

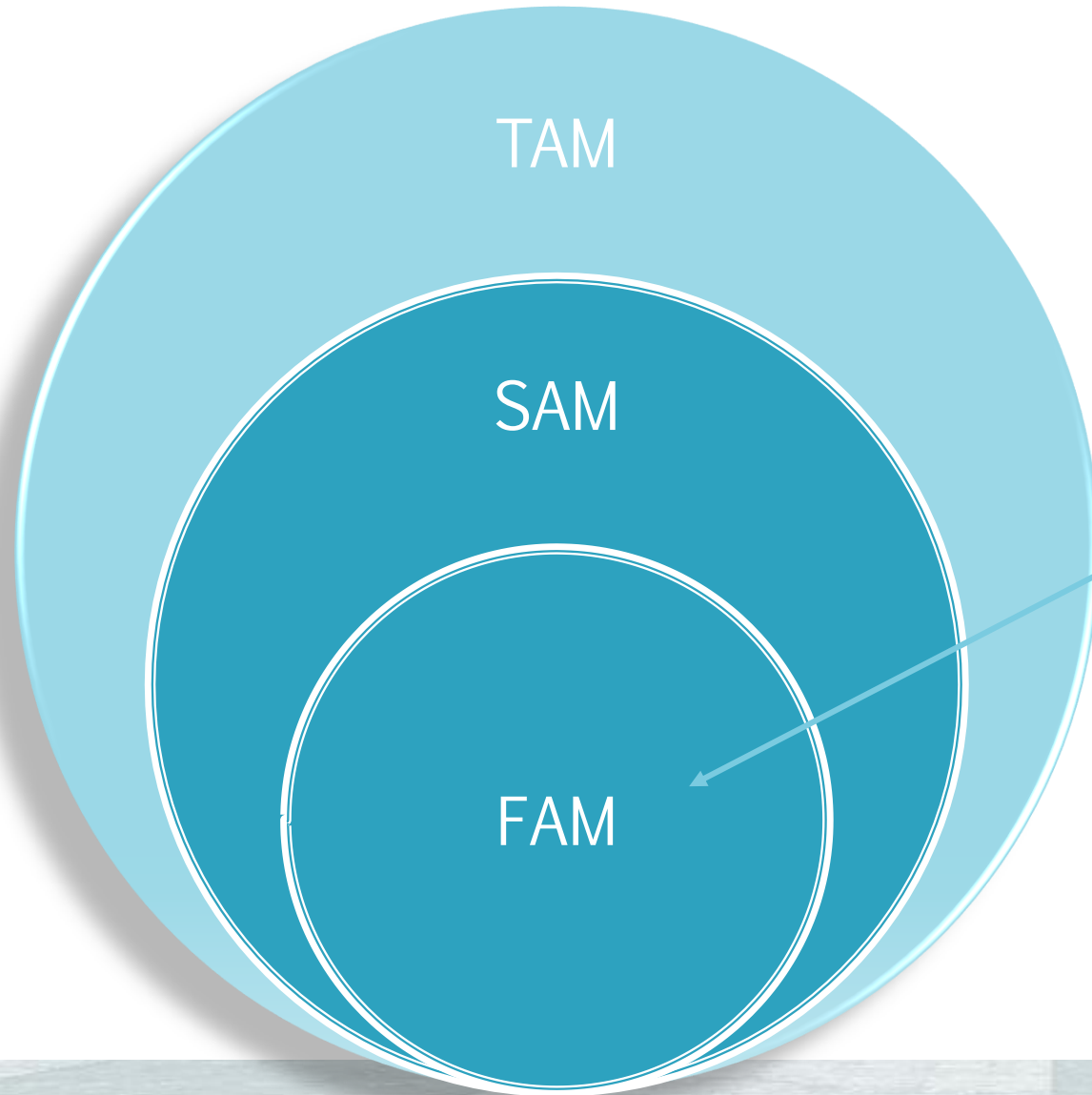
Total Managed Security Services Market: Percent Revenue Forecast by Segment, North America, 2013



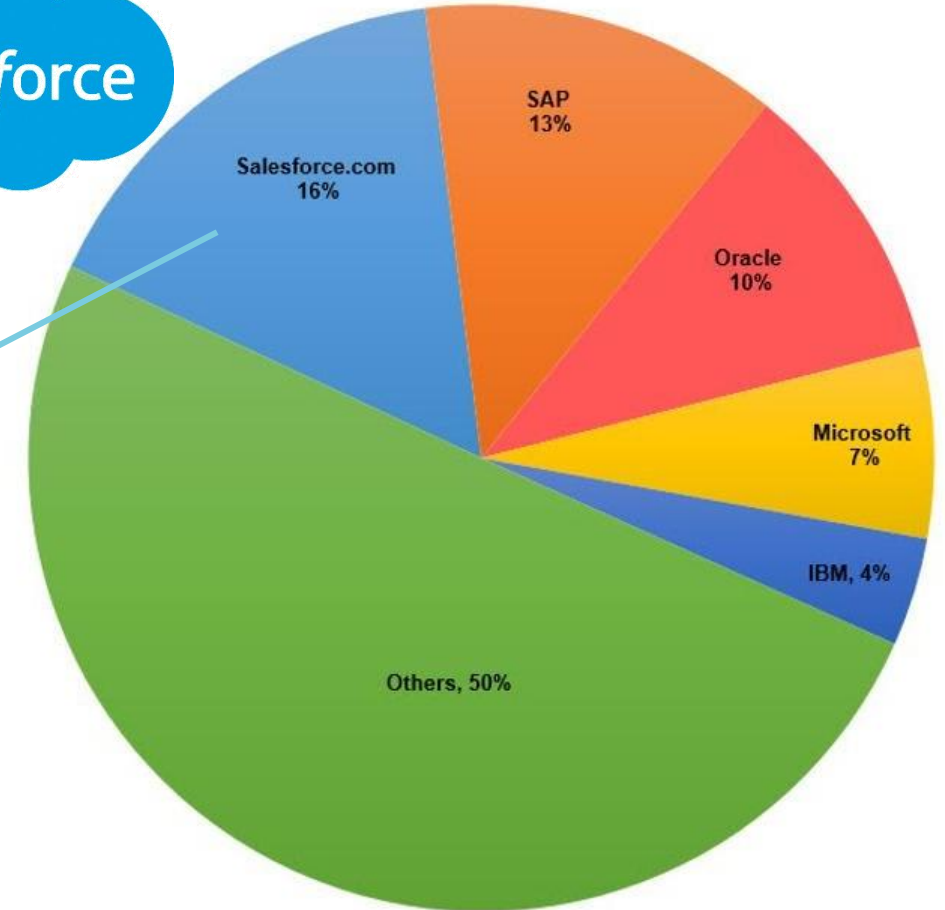
FROST & SULLIVAN

Note: All figures are rounded. The base year is 2013. Source: Frost & Sullivan

# EXERCISE: FAM-CLOUD?



Worldwide CRM Software Spending By Vendor, 2013  
Market Size: \$20.4B: 13.7% Growth Over 2012



# Level 1 Targets

Target Prospect	Solution: Consultative Embedded IT/IS/Dev Team
<b>Size:</b>	11-50, 51-200, 201-500, 501-1000 employees
<b>Geos:</b>	No CA
<b>LinkedIn Verticals:</b>	Accounting, Banking, Biotechnology, Broadcast Media, Capital Markets, Electrical/Electronic Manufacturing, Financial Services, Hospital & Health Care, Insurance, Investment Banking, Investment Management, Legal Services, Media Production, Medical Devices, Nonprofit Organization Management, Pharmaceuticals, Philanthropy, Publishing, Venture Capital & Private Equity
<b>Attribute 1:</b>	Have little to no internal IT/IS/Dev team
<b>Attribute 2:</b>	Regulated (GRC) and/or technology/security-related risk factors
<b>Attribute 3:</b>	Well-funded, high-growth, well-managed
<b>NOTES:</b>	Client requirements can support \$10K+/mo in technology services

# Level 2 Targets

Target Prospect	Solution: Consultative Embedded Salesforce Dev Team
<b>Size:</b>	201-500, 500-1000, 1001-5000
<b>Geos:</b>	No CA, So CA
<b>LinkedIn Verticals:</b>	Consumer Electronics, Consumer Goods, Consumer Services, Retail
<b>Attribute 1:</b>	Large sales force that requires advanced Salesforce.com capabilities
<b>Attribute 2:</b>	PCI DSS regulated
<b>Attribute 3:</b>	Well-funded, high-growth, well-managed
<b>NOTES:</b>	Client requirements can support \$10K+/mo in development services

# Level 3 Targets

Target Prospect	Solution:
<b>Size:</b>	201-500, 500-1000, 1001-5000
<b>Geos:</b>	Top MSAs (CA, TX, NY, etc.)
<b>LinkedIn Verticals:</b>	E-Learning, Higher Education, Accounting, Banking, Biotechnology, Broadcast Media, Capital Markets, Electrical/Electronic Manufacturing, Financial Services, Hospital & Health Care, Insurance, Investment Banking, Investment Management, Legal Services, Media Production, Medical Devices, Nonprofit Organization Management, Pharmaceuticals, Philanthropy, Publishing, Venture Capital & Private
<b>Attribute 1:</b>	Expanding or supplementing IT/IS/Dev teams
<b>Attribute 2:</b>	Regulated (GRC) and/or technology-related high risk factors
<b>Attribute 3:</b>	Well-funded, high-growth, well-managed
<b>NOTES:</b>	Client requirements can support \$20K+/mo in technology services

# SWOTs

## Strengths

1. Business approach to IT
2. Mature, proven client track record
3. Tactical & strategic, full spectrum

## Weaknesses

1. Limited certifications
2. No SFDC architects
3. Lack qualified security assessor



1. GRC business risk assessment
2. Cloud migration/risk expertise
3. Consultative vs. IT quick-fix

## Opportunities

1. Limited marketing/reach
2. Competitors have certs
3. Growth constraints

## Threats

# Strength of Solutions

## Executive Summary—CEO's Perspective

- 1 The sophistication of advanced persistent cyber threats is growing rapidly. Managed security service providers provide specialized expertise to combat such threats.
- 2 Network security professionals are in high demand and may be difficult to recruit and retain. Managed security services alleviate some of the human resource burden.
- 3 A proliferation of network security point solutions has increased the complexity of network security. Outsourcing the complex security management is compelling.
- 4 Compliance requirements require special attention. Manage security service providers are experts in assisting businesses in maintaining compliance.
- 5 Businesses can outsource to a service provider, but can never outsource responsibility.



Source: Frost & Sullivan

FROST & SULLIVAN

FRONT & SULLIVAN

Solution	Strength
IT / IS team creation	Fast, efficient, integrated, certified, strategic, business-centric, proven, GRC risk mitigation expertise
IT / IS team augmentation	Non-disruptive, experiences, seamless, integrated, certified, strategic, business-centric, proven, proven, GRC risk mitigation expertise
SFDC / App Dev	Fast, efficient, technical + business-centric, proven, low-risk, process-flow-centric, practical vs. theoretical





# Primary Competitors



Competitor	Weakness
Intuz, Margasoft, Xantrion, SPOC, Kinetix, Precision, LookingPoint, parachute, MicroMenders, 42 Inc, MPA, Janus, Endsight	IT quick-fix tactical vs. consultative long-term business-centric, limited GRC expertise, limited SFDC dev expertise
<a href="https://clutch.co/it-services/msp">https://clutch.co/it-services/msp</a>	

# GAPs

100 Clients

+ 6 Clients

<\$10K/mo per Client

>\$10K/mo per Client

<\$50K MRR

>\$50K MRR


No Marketing KPIs

Best Practice Conversions

Sales KPIs: <10% SQL close

>10% SQL close

# KPI Goal: Average to Best Practice



Lead Stage	Average Conversion Rates	Required for 1 New Customer	Best Practice Conversion Rates	Required for 1 New Customer
Inquiry	4.4%	351.4	9.3%	70.4
Marketing Qualified Lead	66.0%	15.5	85.0%	6.5
Sales Accepted Lead	49.0%	10.2	62.0%	5.6
Sales Qualified Lead	20.0%	5.0	29.0%	3.4
New Customer		1		1
Overall Lead-to-Revenue Conversion Rate	0.28%		1.42%	

# Neuroscience Overview



HYUNDAI



PEPSICO

Procter & Gamble



# STAR TREK



**Neocortex**

**Logical Brain**

Head: "facts & figures"



**Limbic System**

**Emotional Brain**

Heart: "feelings & friends"



**Reptilian Complex**

**Instinctual Brain**

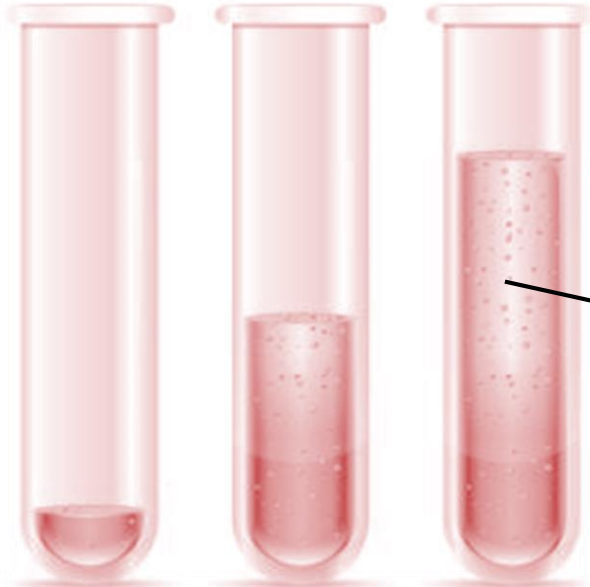
Gut: "risks & fears"







We are more  
Instinctual,  
Emotional, or  
Logical.





**Neocortex**  
**Logical Brain**  
 Head: "facts & figures"

Technical, detailed, alert, analytical, observational, cautious  
 "Approval Buyers," cautious, safe, secure, need approvals or input from others at firm. "Rocket Scientists," detail-oriented, ROI-focused, facts & figures, graphs & charts, engineers.  
**High Norepinephrine** = high anxiety & stress—focus on keeping them calm, informed, and making logical and safe decisions.



**Limbic System**  
**Emotional Brain**  
 Heart: "feelings & friends"

Creative, emotional, perceptive, goal-oriented, friendly  
 "Friendly Buyers," easy-going, talkative, relationship-oriented, love stories, keep up with Joneses. "Partner Buyers," need approval and collaboration from others on their team.  
**Medium Norepinephrine** = medium anxiety & stress—focus on passion, purpose, helping others, relationships, fun, stories.

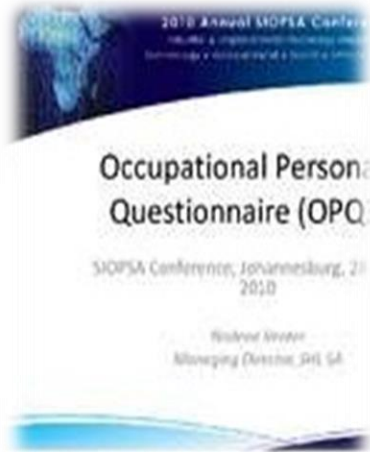


**Reptilian Complex**  
**Instinctual Brain**  
 Gut: "risks & fears"

Calm, hard-working, ethical, in control, stubborn, fast decision  
 "Detailed Buyers," focused on black & white, making the perfect & right decision, detail oriented, they are always right.  
 "Command Buyers," in control, decisive, fear of loss, respect you if you're strong and unintimidated, they are always right.  
**Low Norepinephrine** = low anxiety & stress—focus on fear of loss, being in control, making the right decision, integrity.



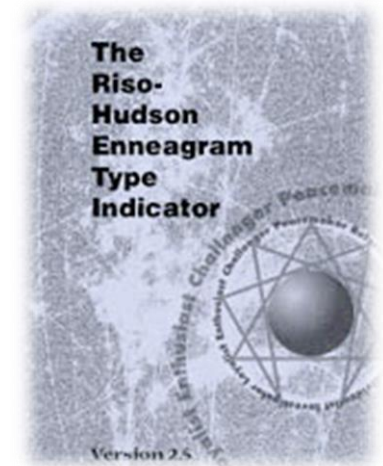
# Personality Profiling



Myers Briggs



Type Indicator



# Messaging: Why is it Critical?

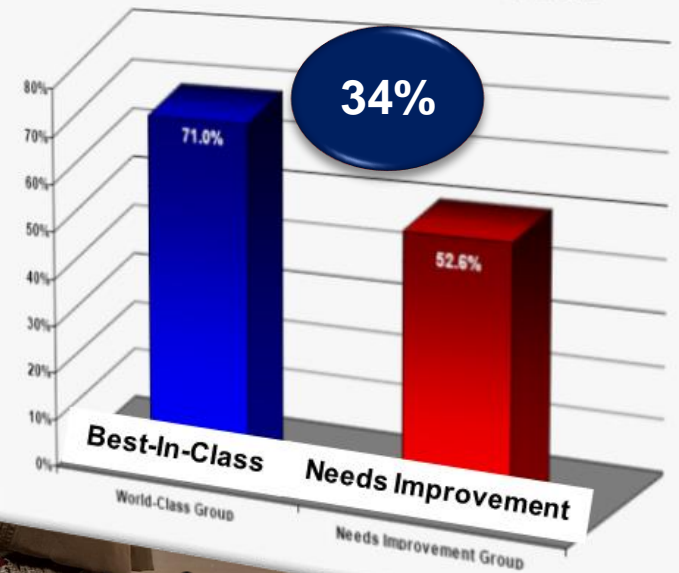


## Introducing: The Sales Effectiveness/Effort Grid



**CSO** *INSIGHTS*  
Measuring Effectiveness  
Chief Sales Officer

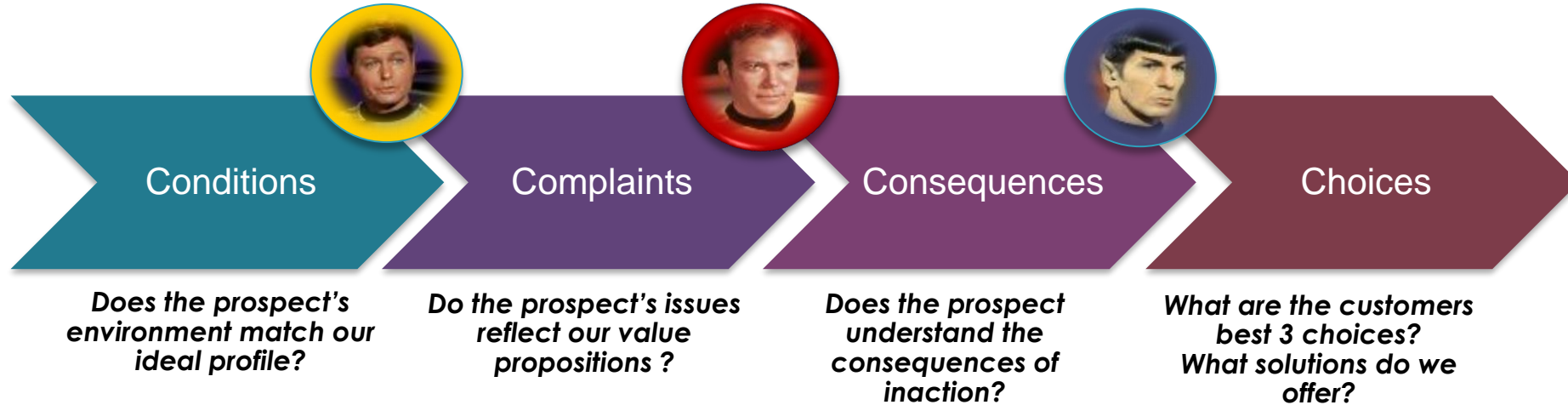
## Comparison of Percentage of Reps Achieving Quota



CSO Insights Study

*Better sales messaging = 34% more sales*

# Messaging Models



***"Sticky"  
SUCCEs Model***

- Simplicity
- Unexpectedness
- Correctness
- Credibility
- Emotions
- Stories

# Neuron Color Spectrum

Wavelength	Positive Emotion	Neuron Stimulation	Negative Emotion	Neuron Stimulation
630 - 780 nm	Passion, Importance, Energy, Excitement	Dopamine Norepinephrine	Anger, Fear, Impact, Aggression	Cortisol Norepinephrine
590 - 630 nm	Playful, Energetic, Fun, Frugal	Dopamine Norepinephrine	Concern, Ignorance, Deceit, Edgy	Cortisol Norepinephrine
570 - 590 nm	Happy, Friendly, Easy, Simple	Dopamine Norepinephrine	Caution, Criticism, Jealousy, Lazy	Cortisol
500 - 570 nm	Natural, Safe, Stable, Harmonious	Serotonin Oxytocin	Money, Greed, Mistrust, Jealousy	Cortisol
450 - 500 nm	Serene, Trustworthy, Inviting, Calm	GABA Oxytocin	Tired, Uninterested, Dispassionate	Cortisol Serotonin
420 - 500 nm	Dependable, Expert, Peaceful	GABA Serotonin	Depressed, Cold, Passive	GABA Serotonin
390 - 420 nm	Luxurious, Mysterious	GABA	Gloomy, Sad, Moody	GABA

# The 3-Act Play

## ACT I Departure

ORDINARY  
WORLD

Begins Hero's  
Journey



## ACT II Trials

NEW WORLD



Overcomes  
Obstacles

## ACT III Return

RETURN HOME



Defeats  
Antagonist &  
Returns with  
Magic "Elixir"



# The 3-Act Sales Play™

**ACT I**  
Like Me

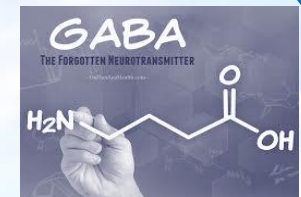
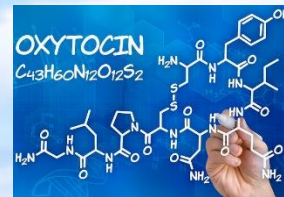
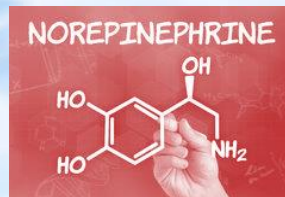
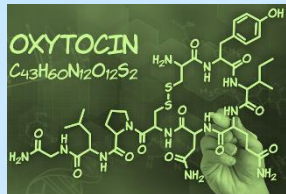
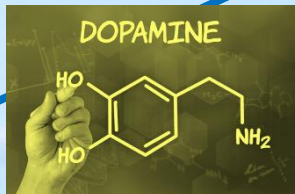
Relaxed  
Confident  
Friendly

**ACT II**  
Trust Me

Urgent  
Concerned  
Staccato

**ACT III**  
Believe Me

Calm  
Authoritative  
Knowledgeable



# Contrasts & Threes

## Credible Visual Contrasts



Waiting for customers to call you.

or



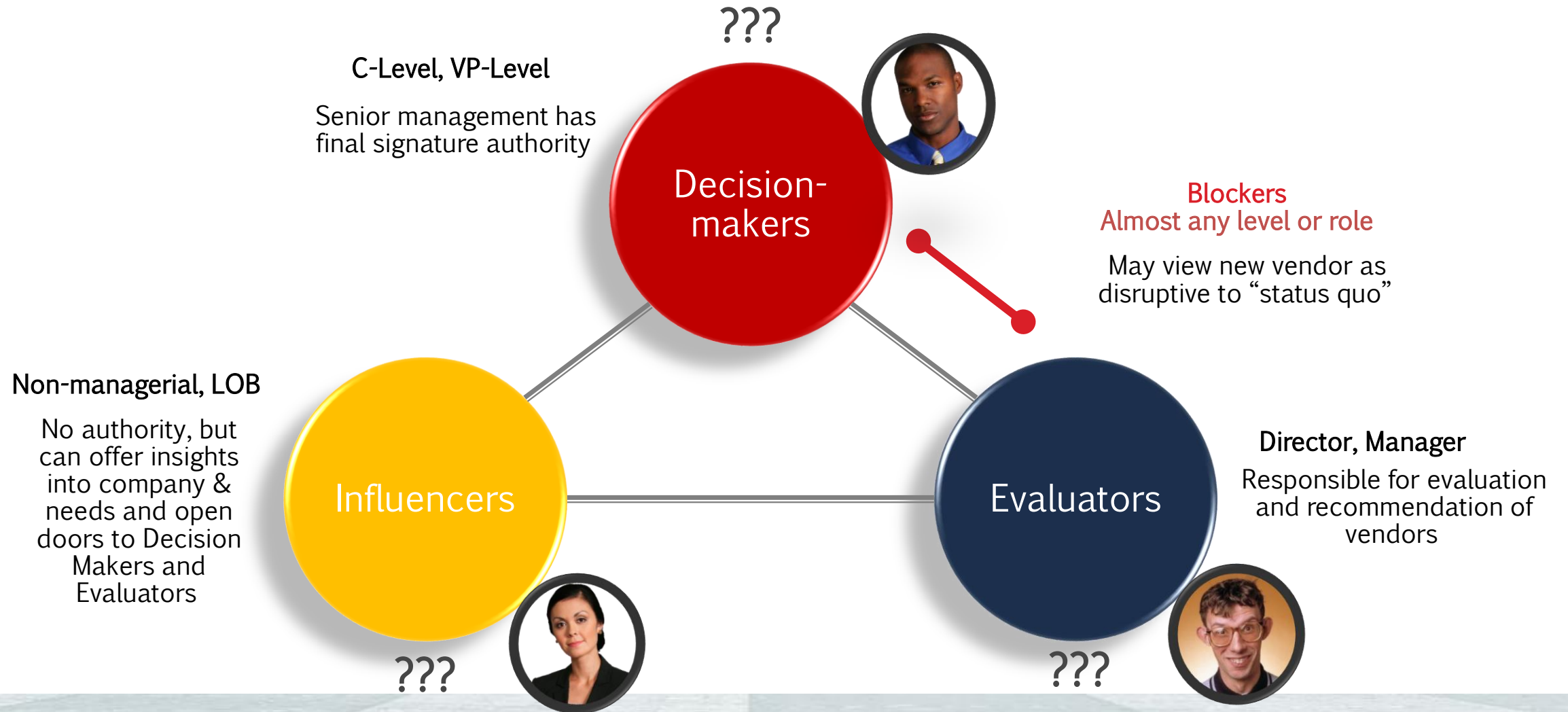
Immediately connecting with thousands.

## The Power of 3




- 3 Act Sales Story
- 3 Value Propositions
- 3 Logical Choices

# Prospect Roles





# Influencer Persona

Type	 More emotional
Title	Senior-Level, Manager, Director
Role	Accounting, HR, Sales, Marketing, Operations, Finance
Experience	5+ years
Education	Bachelor+
Key Influencers	C-Level, IT/IS, Customers, Vendors
Business Needs	Tactical to solve Line-of-Business revenue-blocking issues




# Evaluator Persona

Type	 More logical
Title	CTO, CIO, CISO, COO, VP, Director
Role	Operations, Development, IT, IS, Technology
Experience	5+ years
Education	Bachelors+
Key Influencers	LOB, CEO
Business Needs	Tactical & Strategic to remove roadblocks for LOB stakeholders + creating strategic growth infrastructure



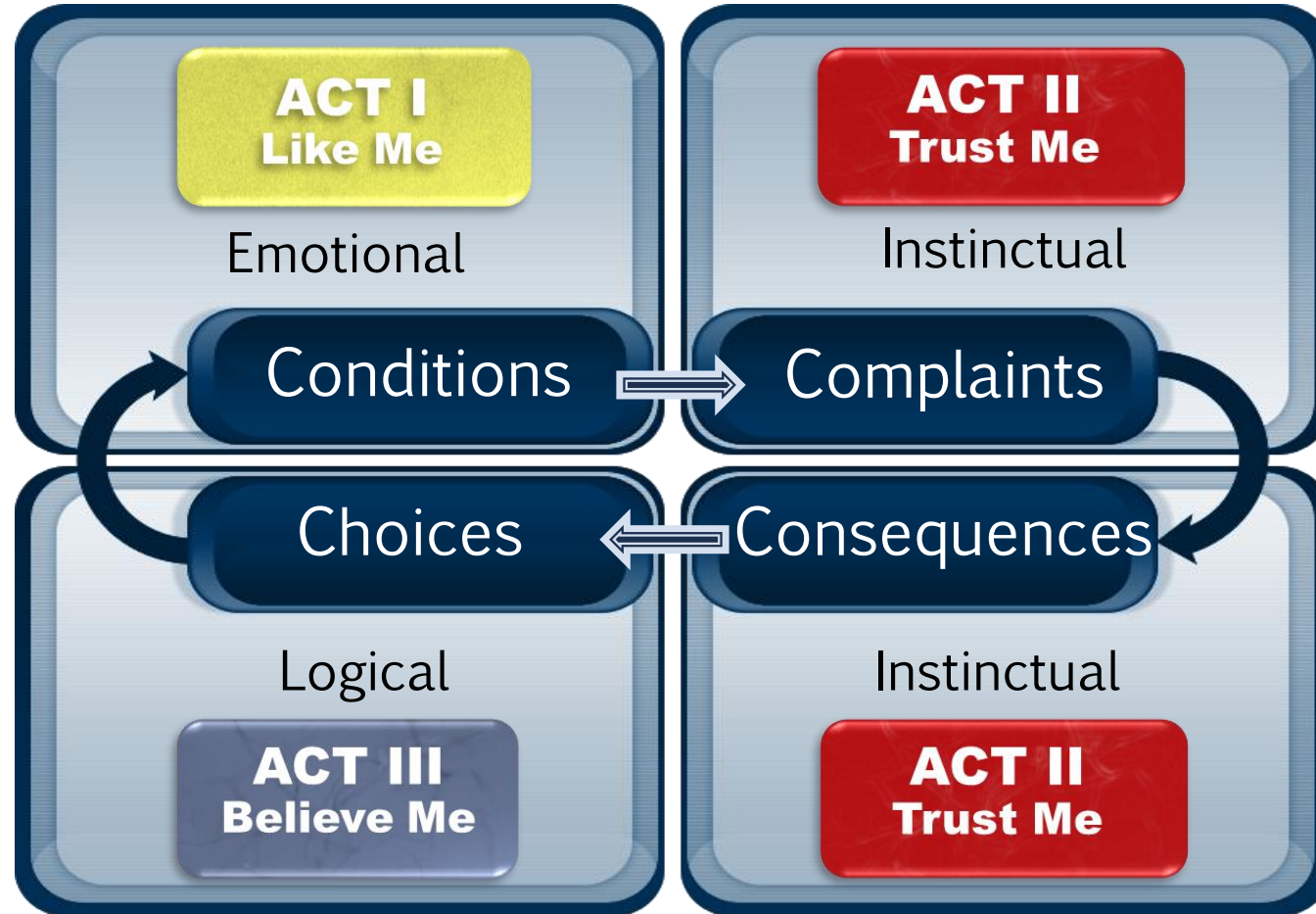
# Decision-Maker Persona

Type	 More instinctual
Title	CFO, COO
Role	Final decision maker, may also be Blocker or Evaluator
Experience	10+ years
Education	Masters
Key Influencers	LOB, IT/IS, Customers, Vendors, CEO
Business Needs	Strategic to position firm for scalable & efficient growth



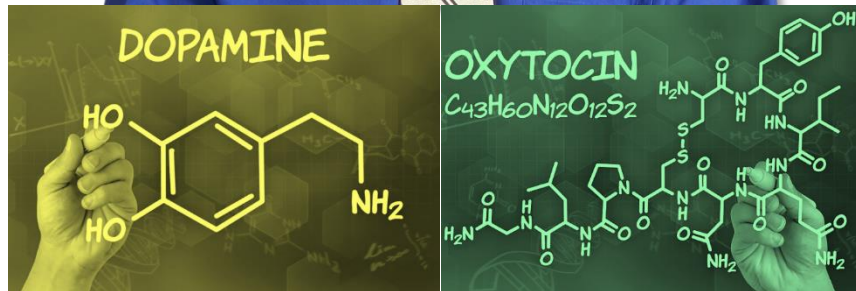
# Sales Messaging Cube™

*Sales  
Messaging  
Questions to  
Engage and  
Quality  
Prospects*



## ACT I Like Me

# Condition Questions



- ▶ Used to gather facts
- ▶ Non-threatening & friendly
- ▶ Used judiciously
- ▶ Reduced with proper preparation
- ▶ Best asked of Influencers
- ▶ Prompted by: “what, how, when, where, today, goal, vision, thought”

**ACT I**  
**Like Me**

# Condition Questions



Prospect	
<b>Influencer 1:</b>	Describe your firm's "why," the reason you are in business and the passion and purpose that drives your firm
<b>Influencer 2:</b>	Describe your firm's current situation, how are you doing things today, what do you have in place, how is that working for your team?
<b>Evaluator 3:</b>	Describe your firm's current situation, how are you doing things today, what do you have in place, how is that working for your team?
<b>Evaluator 4:</b>	Describe your firm's plans to change or improve the above.
<b>Decision 5:</b>	Describe your firm's "why" and your quarterly goals and strategic long-term vision
<b>Decision 6:</b>	Describe how you envision empowering your team to meet your firm's goals and vision
NOTES:	

# Concern Questions



- ▶ Probe for concerns
- ▶ Build perceived value
- ▶ Show empathy
- ▶ Don't offer solutions yet
- ▶ Best asked of Evaluators
- ▶ Prompted by: “problem, issue, pain, concerns, dislikes, etc.”
- ▶ Customers should feel pain

# Concern Questions

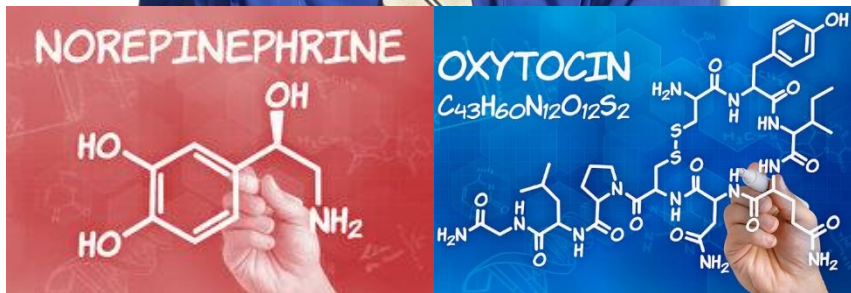


Prospect	
<b>Influencer 1:</b>	What are your three primary concerns that might hinder your firm's ability to achieve its "why?"
<b>Influencer 2:</b>	What are your three top problems that are causing issues?
<b>Evaluator 3:</b>	What are your three top problems that are causing issues?
<b>Evaluator 4:</b>	What are your three main roadblocks that might prevent you from implementing your future plans?
<b>Decision 5:</b>	What are the three main reasons why you might be delayed or prevented from reaching your quarterly or long-term company goals?
<b>Decision 6:</b>	What are the top three obstacles you'd like to remove to ensure that your team can drive better operational efficiencies & cost reductions?
NOTES:	



## ACT II Trust Me

# Consequence Questions

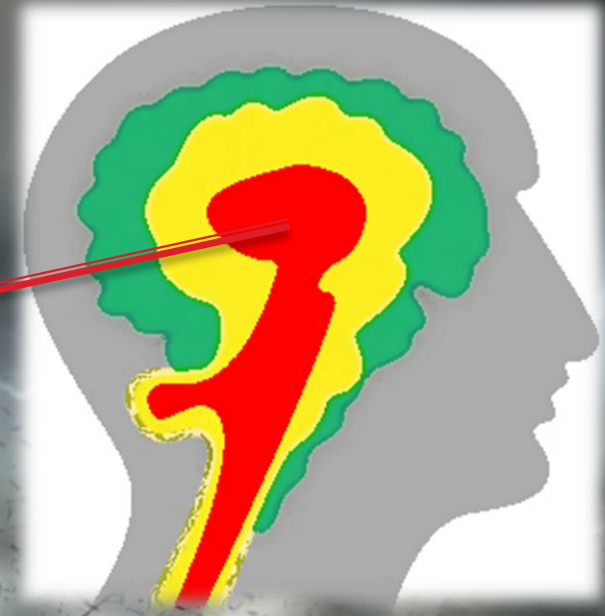


- ▶ Explore perceived impact of concerns
- ▶ Build customer perception of value
- ▶ Best asked of Evaluators & Decision Makers
- ▶ Focus on the Consequences of inaction
- ▶ Prompted by: “Impact, Result, Cause, Effect, Cost, Disaster, Worst Case, etc.”
- ▶ Customer should feel fear



# R-Complex Messaging

*Old School = Value Propositions  
New School = R-Complex Messaging*



*ANXIETY INCREASES  
NOREPINEPHREIN & CORTISOL*



# Influencer Drivers

Type	
Emotional Driver	Job satisfaction, recognition from my peers and superiors, lower job stress, lower efforts, friendly vendors that are easy to work with
Instinctual Driver	Help my firm lower risks and avoid competitive pressures and loss of revenue
Logical Driver	Help others in my firm lower costs & efforts while improving efficiencies.



# Evaluator Drivers



Type	
Emotional Driver	Job satisfaction, recognition from my peers and superiors, lower job stress, lower hassles, friendly vendors that are easy to work and reliable.
Instinctual Driver	Help my team lower risks and avoid competitive pressures and loss of market share.
Logical Driver	Help my team lower costs, reduce efforts while improving efficiencies.

# Decision-Maker Drivers

Type	
Emotional Driver	Praise from my board or superiors and direct reports, industry recognition, satisfaction from attaining my goals.
Instinctual Driver	Avoid being fired by board or superiors, attain quarterly revenue and KPI targets, avoid competitive pressures and loss of market share.
Logical Driver	Ensure my firm lowers costs and reduces efforts while improving efficiencies and lowering risks. Ensure strategic foundation is in place to attain long-term goals and vision.

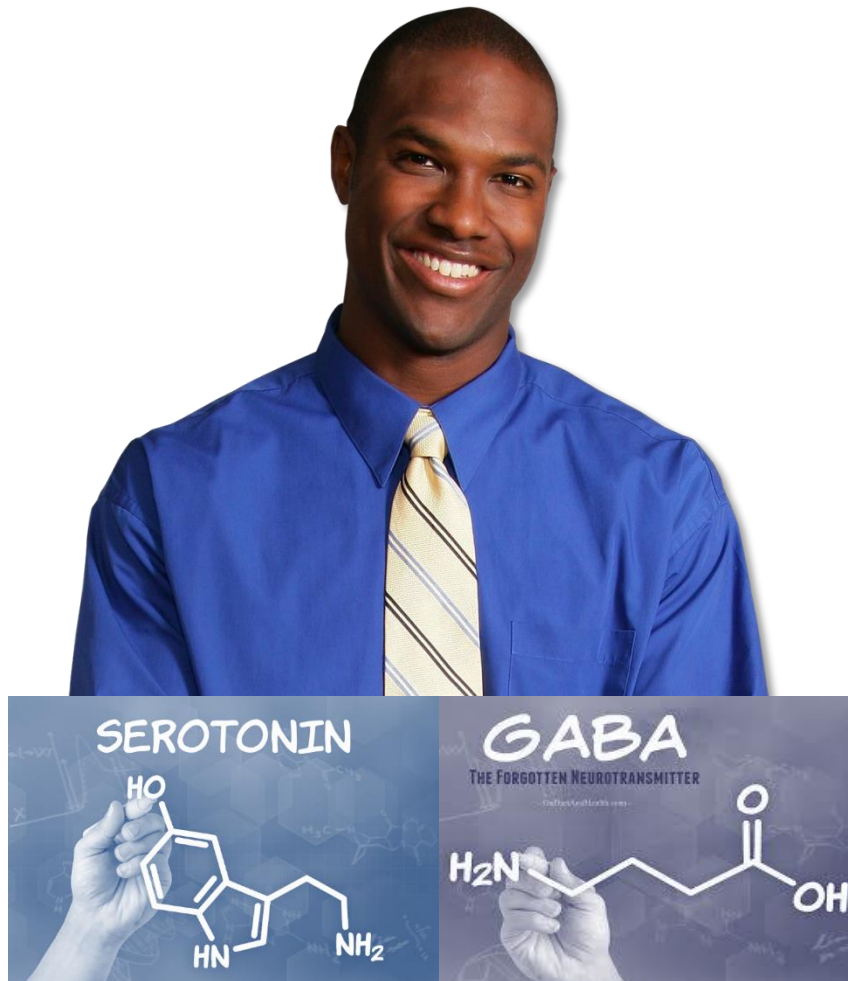


# Consequence Questions



Prospect	
<b>Influencer 1:</b>	What might happen to your colleagues if your firm fails to achieve it's short-term goals and long-term plans?
<b>Influencer 2:</b>	What happens if your colleagues are unable to solve their three top problems that are causing the issues you described?
<b>Evaluator 3:</b>	What happens if your team is unable to solve their three top problems that are causing the problems you described?
<b>Evaluator 4:</b>	What is the impact to you and your firm if you fail to remove the three main roadblocks you just outlined?
<b>Decision 5:</b>	What consequences do you face if your firm is delayed or prevented from reaching your quarterly or long-term company goals?
<b>Decision 6:</b>	Can you quantify how it might hurt your firm if you can't remove the obstacles that will prevent your team from driving better efficiencies and cost reductions?
NOTES:	

# Choice Questions



- ▶ Shift focus to ONLY 3 solutions
- ▶ Get customer to repeat benefits
- ▶ Should be open questions, not closed
- ▶ Focus on the “relief” (value benefits)
- ▶ Help rehearse customer’s pitch to others
- ▶ Prompted by: “Would, Could, Might, How, Which, What if, Can we, etc.?”
- ▶ Customers should feel relief & joy

# Choice Questions



Prospect:	
<b>Influencer 1:</b>	What if there was an easy way to help your colleagues achieve all their short-term goals and long-term plans?
<b>Influencer 2:</b>	What if you could help your colleagues solve their three top problems that are causing the issues they face?
<b>Evaluator 3:</b>	What if you could assist your team in solving the three top problems that are causing severe issues?
<b>Evaluator 4:</b>	What if there was a way to avoid the devastating impact you face by failing to remove your three main roadblocks to success?
<b>Decision 5:</b>	What if you could avoid the serious consequences of being delayed or prevented from reaching your quarterly or long-term company goals?
<b>Decision 6:</b>	What if you could remove the obstacles that will prevent your team from driving better efficiencies and cost reductions?
NOTES:	





# Sales Messaging House

~8 words

Echo instantly becomes or augments your technical team.

~15 words

Echo Technology Solutions instantly becomes or augments your technical team to help you avoid risks and increase profits.

~25 words

Echo Technology Solutions helps small to mid-sized firms avoid risks and increase profits by instantly their information technology, security, and development team.

~50 words

Echo Technology Solutions is passionate about helping you avoid risks and increase profits by instantly becoming or augmenting your information technology, security, or development team.

We do this by leveraging our proven, certified, and efficient business-centric experts

to help your small to mid-sized firm lower costs, concerns, and complexities.

WHY:

HOW:

WHAT:

WHO:

# Before...

## Ineffective "Push Model" Messaging

**About Booz Allen**

Booz Allen Hamilton has been active for over 60 years in technology consulting for more than 80 years. Providing a broad range of services in strategy, operations, organization and change, information technology, systems engineering, and program management, Booz Allen is committed to delivering results that endure.

**Booz Allen Commercial Technical Assessment Services**

**Customized Technical Assessment Methods for Securing IT Assets**

Today's information security professionals are faced with an increasing number of security threats, including malware, phishing, social engineering, and advanced persistent threats (APTs). These threats are often sophisticated and multi-layered, making it difficult to detect and prevent them. Booz Allen's technical assessment services are designed to help organizations identify and address these threats before they can cause significant damage.

Booz Allen has developed capabilities to meet the technical assessment challenges of our clients, who are responsible for any business. By ensuring the most robust level of the assets that are most valuable or highest at risk, we are able to realize the greatest value for our clients.

Capability Summary	Advantages	Challenges
<b>Network Assessments</b>	• All-in-one solution for network, system, and application security	• Information overload
<b>Penetration Testing</b>	• Proactive security testing to identify vulnerabilities before they are exploited	• Limited budget
<b>Endpoint Testing</b>	• Proactive security testing to identify vulnerabilities before they are exploited	• Limited budget
<b>Mobile Device Security Assessment</b>	• Proactive security testing to identify vulnerabilities before they are exploited	• Limited budget
<b>Application Security</b>	• Proactive security testing to identify vulnerabilities before they are exploited	• Limited budget
<b>Operational Assessment</b>	• Proactive security testing to identify vulnerabilities before they are exploited	• Limited budget

**Booz Allen's Perspective**

Booz Allen Hamilton understands that it is infeasible to perform in-depth testing of every information system within an organization. Additionally, not all systems and information are created equal. Therefore, assessment needs and security controls vary depending on the data being protected. We believe security assessments should be tailored to the specific data, systems, and the risk of the system. Our technical assessment services are designed to help organizations identify and address these threats before they can cause significant damage.

Brief introduction  
Two sentence problem statement

Detailed solution information

**Our Services and Approach**

Booz Allen's testing begins with an assessment planning where we work closely with our clients to understand their objectives and/or our test plans to cost effectively meet their needs. The approach we will offer include:

- Take Inventory of Assets
- Develop Test Plan
- Identify Vulnerabilities and/or
- Define Outcomes
- Standards
- Address any other unique project management needs
- Develop Project Plan

Technical assessment capabilities are provided through varying levels of access to the system. For open-to-the-world systems, we provide full, partial, and system access to assess all potential vulnerabilities as identified. With penetration testing, we provide access to information for a specific user or role. Test plans will usually include multiple capabilities to test and obtain results from full and restricted access (eg, full) and/or experts to better determine the residual risk.

**Assessment Planning** → **Test Execution** → **Initial Report** → **Reporting**

Booz Allen maintains a library of testing tools and techniques that allow customers to perform technical assessments quickly and efficiently across any of our capability areas. Below is a selection of some of our popular tools that we leverage while performing technical assessments.

- Secure Testing Appliance** - A customized appliance that enables secure remote vulnerability analysis or penetration testing that can simulate a range of attack scenarios, such as the classic "red team" model. The device is configured to act as a proxy server, providing all sensitive data with strong encryption, routing the network services directly accessible from the network, and supporting configurations to meet the needs of various configurations.
- Distributed Password Cracker** - A proprietary Booz Allen tool leverages the latest available password cracking engine, distributed across a wide range of CPUs, and is scalable to support up to several thousand CPUs. This tool works with the ability to perform cryptographic attacks at supercomputing speeds, simulating a legitimate malicious attack within a very short period of time.
- Endpoint Toolkit** - A Booz Allen developed collection of scripts and scanning tools that allow us to quickly gather the network targeting information, ping, or an end-to-end test to verify the host is available and provide a comprehensive report for all of our testing efforts.

With the testing environment and analysis complete, Booz Allen will compile findings into a clear and thorough report. Booz Allen has multiple existing reports that align with regulatory efforts, and it is designed that can be leveraged from detailed technical reports to high-level executive summary reports. Reporting can be delivered in a format that meets the needs of the client, including additional, tailored output and log collection (optional).

**Booz Allen - Your Commercial Cybersecurity Partner**

At Booz Allen, we focus on providing, delivering results that endure.

Our information security and privacy services and methodologies, combined with our thought leadership and deep functional expertise in business strategy, organizational transformation, operational design, and service delivery, enables us to partner with our clients worldwide, driving business through resilient and secure information management.

Booz Allen uses a multi-disciplinary approach to help clients weather the toughest cybersecurity challenges. Through our firm, we have experts in data security, both public and private sectors, helping organizations that are applying across multiple industries. Business and security services performance is our primary challenge, enabling us to quickly help clients develop, deliver, and making enterprise-level cybersecurity programs that work with the company's culture to cost-effectively meet their business objectives. We believe that it's not successful unless our clients are successful, a mentality that drives our partnerships with our clients.

Booz | Allen | Hamilton

Brief Conclusion

Closing statement

# After...

Prospect Survey

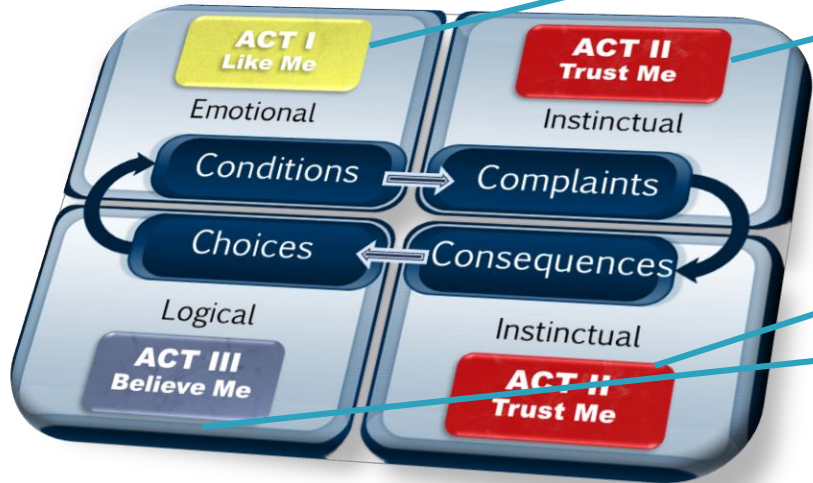
**Question #2**  
Please drag your primary areas of interest or need into the appropriate circles on the right.

Networking  
Servers  
Software  
Storage

Deploy\*  
Decide\*  
I'm not involved

Return Continue

Profile, personality, preferences



Introduction  
Company Branding Message

"Priority Word" Messages

Conclusion  
Company "Elevator" Message  
Call to Action

Booz Allen's Commercial Cyber Security Testing Services

**Cyber Security Issues**  
Economic, risk and compliance mandates have become more challenging, and cyber security attacks are increasing exponentially. Confronting with equipping and uncovering potential attacks that threaten valuable company assets is essential for business survival. Implementing a complete cyber security strategy approach to protect critical information assets starts with a comprehensive security testing assessment. The most demanding clients rely on Booz Allen Hamilton to help design and manage their cyber security testing programs and deliver results that endure.

**Unacceptable Consequences**  
The average cost for a single data security breach is now approaching \$7M. For some firms, lost business from the fallout can be in the billions. Avoiding the consequences and costs of an incomplete or ineffective cyber security approach starts with a thorough understanding of the security infrastructure, systems, and processes balanced against key business, government, risk and compliance requirements. A successful cyber security program requires a solid foundation based on knowledge derived from empirical data. Starting or improving a comprehensive cyber security information program, and selecting the right partner to help implement their approach, can be critical to a company's livelihood, especially in high economic times.

**Booz Allen Perspective**  
A successful cyber security program starts with a solid foundation. Booz Allen believes that a strong emphasis should be placed on the planning phase of any program to identify and prioritize high value information assets, ensuring that these assets are tested at the level relevant to their valuation and risk should take into consideration the test types, depth and frequency. Employing a systematic, vendor compliance-driven approach to security testing can yield better test results at lower costs with outcomes that last.

To avoid unnecessary expense and effort, Booz Allen starts with a vulnerability assessment to provide a high-level overview of networks, systems, and applications before engaging in more detailed assessment activities, such as penetration testing. The output of an enterprise vulnerability assessment can act as a validation of existing asset inventories and identify security issues resulting from them. This assessment is completed before more resource-intensive methodologies are used, such as penetration testing or root reviews. A comprehensive vulnerability assessment can also validate firewall and security device configurations and provide useful information regarding networks, systems, and applications that require more detailed assessments. Booz Allen has designed an array of testing tools and techniques that allow our teams to perform technical assessments quickly and efficiently.

These unique and proprietary tools include:

- Secure Testing Application** - An appliance that enables secure remote vulnerability analysis or penetration testing. This simulates a range of attack scenarios, such as the regular trader fraud, and is secure enough to ensure the protection of all sensitive data with high-grade encryption. The appliance runs on network services that are directly accessible from the network and requires no modification to firewall or network configurations.
- Distributed Password Cracker** - This tool employs a password cracking engine and is scalable enough to support up to several thousand CPUs. The Cracker is robust with the ability to perform cryptographic attacks at supercomputing speeds and simulate a long-term malicious attack within a short period of time.
- Enumeration Toolkit** - This is a collection of scripts and scanning tools that gather the necessary targeting information on a single system or an entire enterprise in a cost-efficient and timely manner. The toolkit helps identify the most sensitive targets and provides a common baseline for testing.

Once the testing execution and analysis phases are complete, Booz Allen consolidates the result findings into a clear and thorough report. Multiple testing reports format align with varying staff levels and knowledge requirements from basic and technical to overarching and strategic. Custom reports can be created, as well as test tool output used logs as required.

Challenge	Capability	Advantage
Low "visibility" visibility to security issues	Comprehensive assessment	Reduced risk of data loss and system downtime
Discovery is required to locate all high-value data	Enterprise-wide attack	Proactive threat analysis and mitigation
Discovering security issues before they are exploited	Threat intelligence	Identify and mitigate security risks before they are exploited
Identifying security issues before they are exploited	Threat intelligence	Identify and mitigate security risks before they are exploited
Identifying security issues before they are exploited	Threat intelligence	Identify and mitigate security risks before they are exploited

**About Booz Allen**  
For almost a century, Booz Allen Hamilton has been a leader at the forefront of strategy and technology consulting. Our broad range of services include strategy, operations, information technology, systems engineering, program management, and organizational change. Delivering results that endure, Booz Allen helps ensure that our clients are ready for what's next.

For more information contact:  
Data Security  
Principal  
703.271.6702  
dsawing\_data@bah.com

Alan Day  
Principal  
719.282.2120  
day\_alan@bah.com  
www.boozallen.com

**Booz | Allen | Hamilton**  
delivering results that endure

Customized & Personalized Neuron Assets™

# New Sales Messaging



## EFFICIENT TECHNICAL TEAM

***The Good News:*** Your firm is experiencing rapid growth and the future looks bright.

***The Bad News:*** You don't yet have a fully mature IT or IS team with tactical and strategic business-centric expertise that can instantly solve technology issues while ensuring scalability.



## PROVEN SECURITY EXPERTS

***The Good News:*** Your company is an emerging industry leader with thousands of customers.

***The Bad News:*** You could lose many of those customers & get fined or sued due to security breaches, credit card issues, SSL certification problems, or compliance/audit failures.

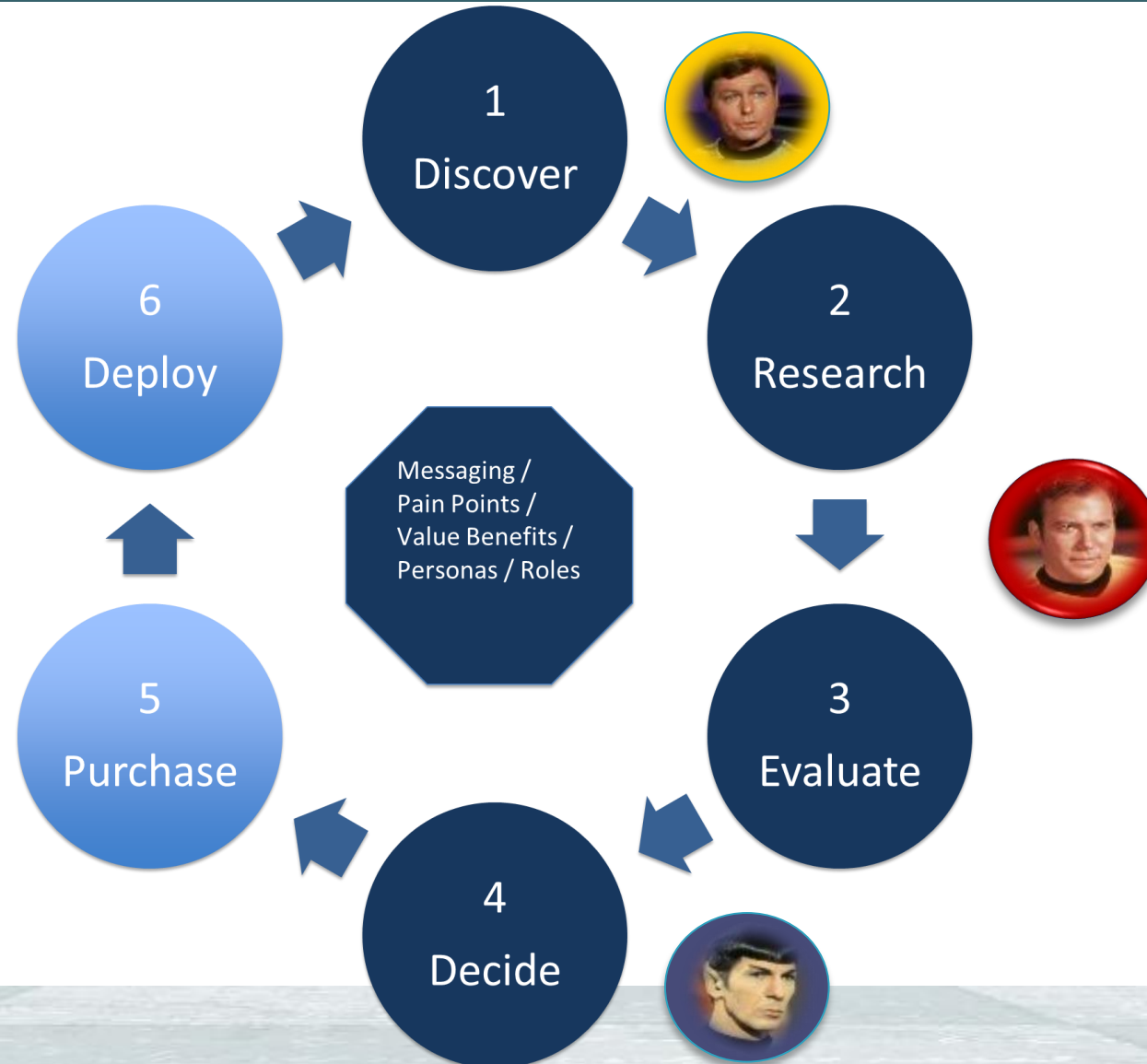


## AFFORDABLE CRM/APP DEVELOPERS

***The Good News:*** Your customer opportunities are growing along with your global sales team.

***The Bad News:*** Your sales team has difficulty exceeding quotas due to inefficient, cumbersome, unintuitive, non-integrated, and antiquated Salesforce CRM/APP development & integration.

# Buyer's Journey

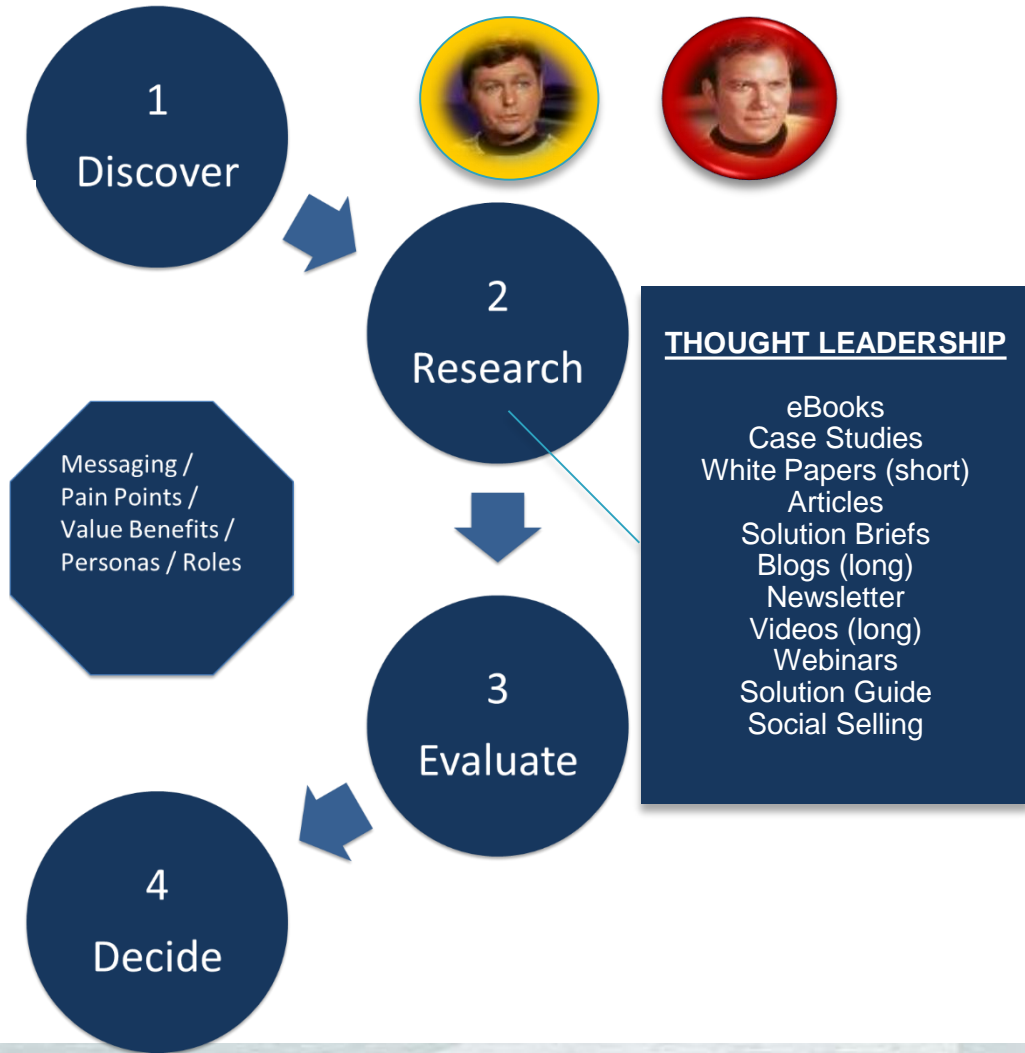


# Discover Assets



Discover/Awareness Stage Assets?
LinkedIn Social Selling Messaging
Blog posts
Newsletters
Press releases
Interactive qualification videos
Website updates & SEO/SEM
Webinars & local events

# Research Assets



## Research/Scope Stage Assets?

IT & IS eBooks

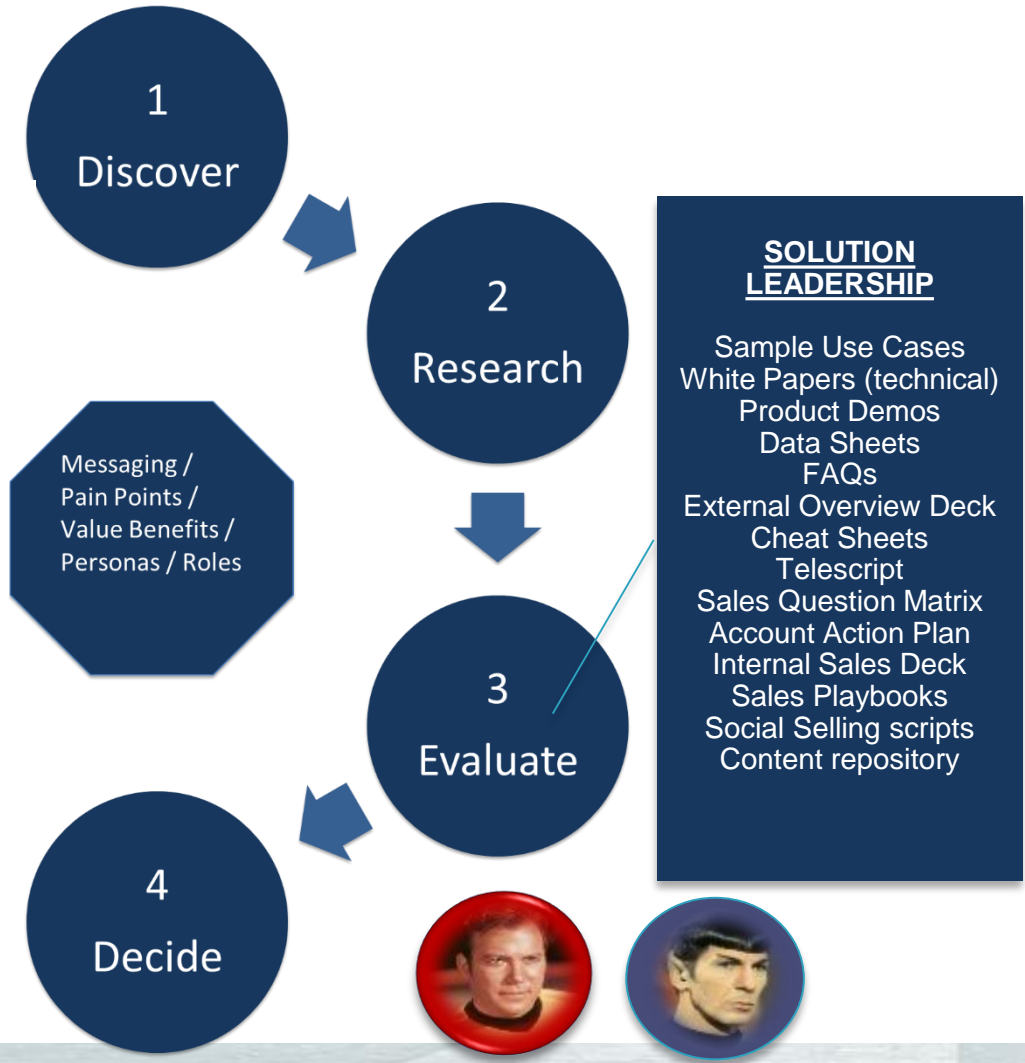
Customer case studies

White papers

Solution briefs

Solution guides

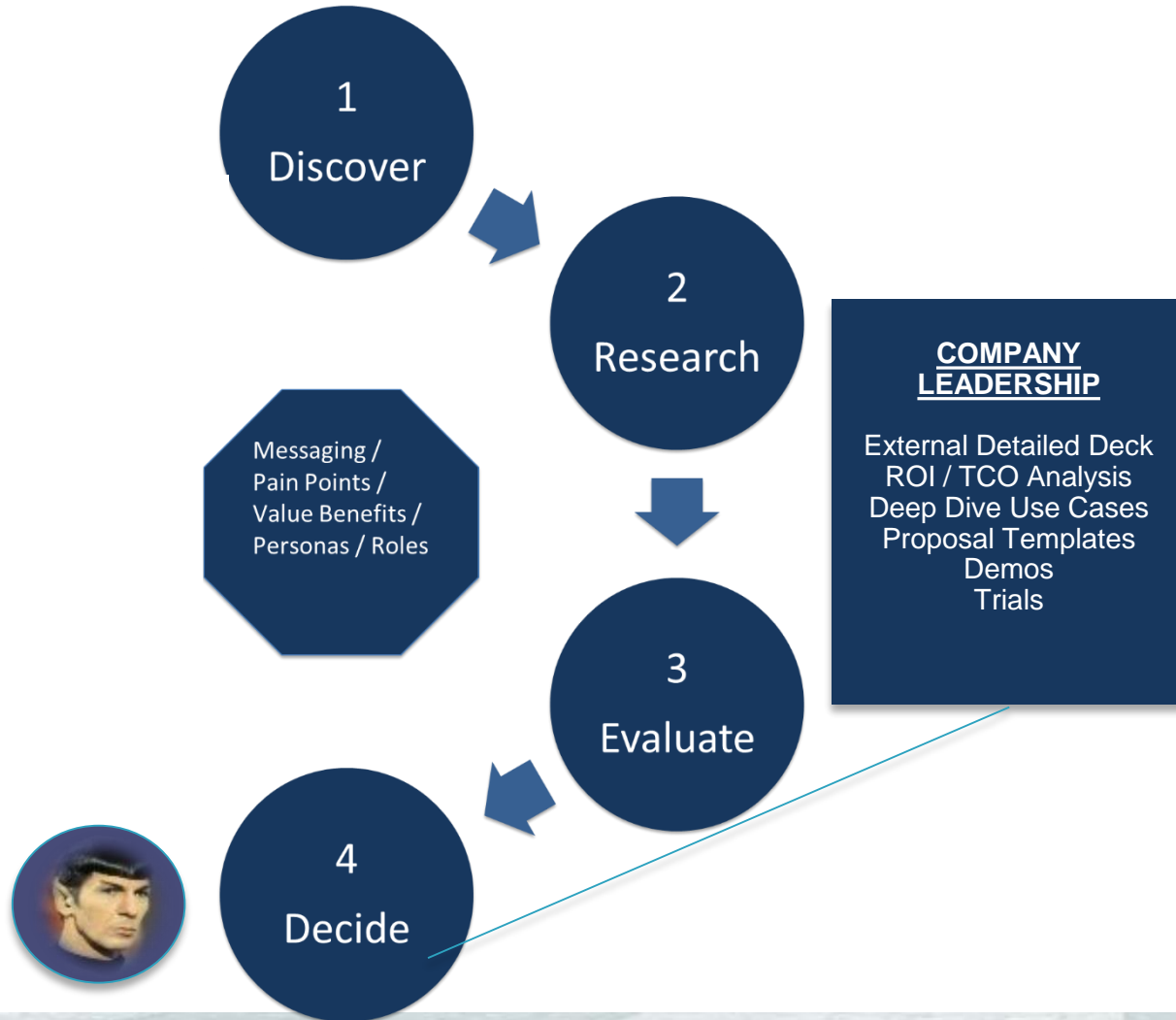
# Evaluate Assets



Evaluate Stage Assets?
FAQs
External sales deck
Telescripts & Social Selling scripts
Sales Question Matrix
Dynamic Interactive Sales Playbook
Content repository / PointDrive setup
Industry-specific best practice guides



# Decide Assets



## Decide Stage Assets?

Customer technical sales decks

ROI/TCO analysis spreadsheets

Proposal templates

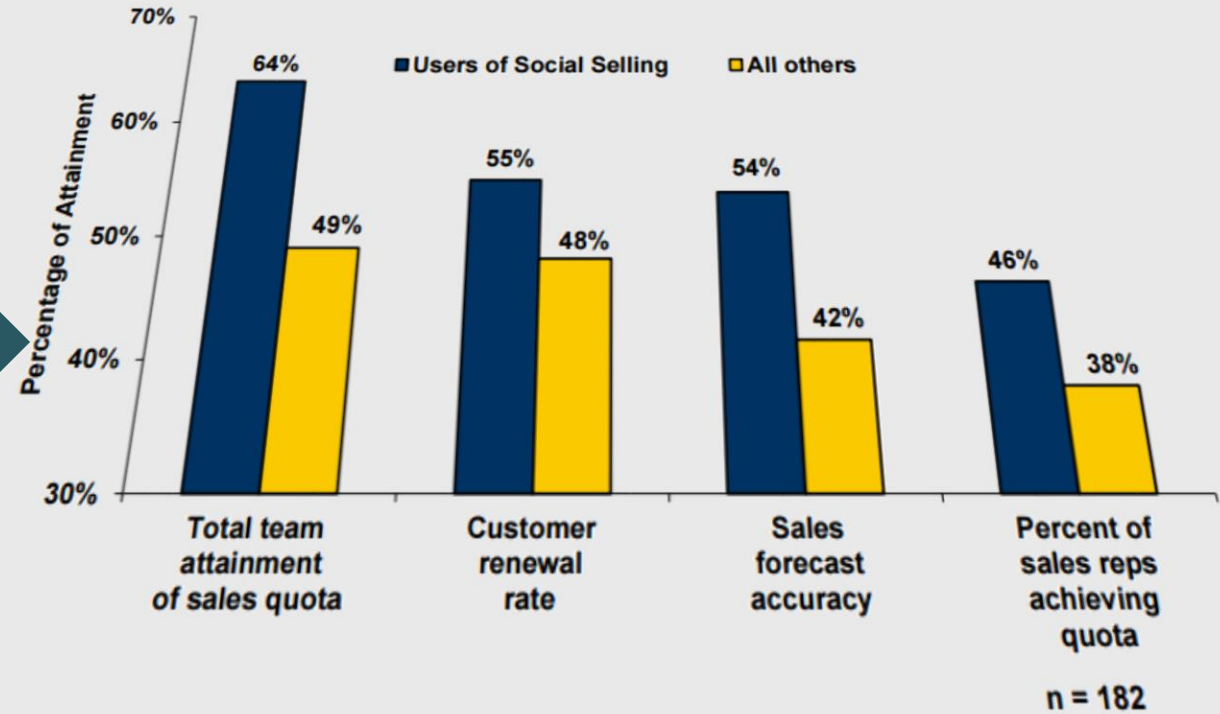
Advanced sales training

# New School: Social Selling

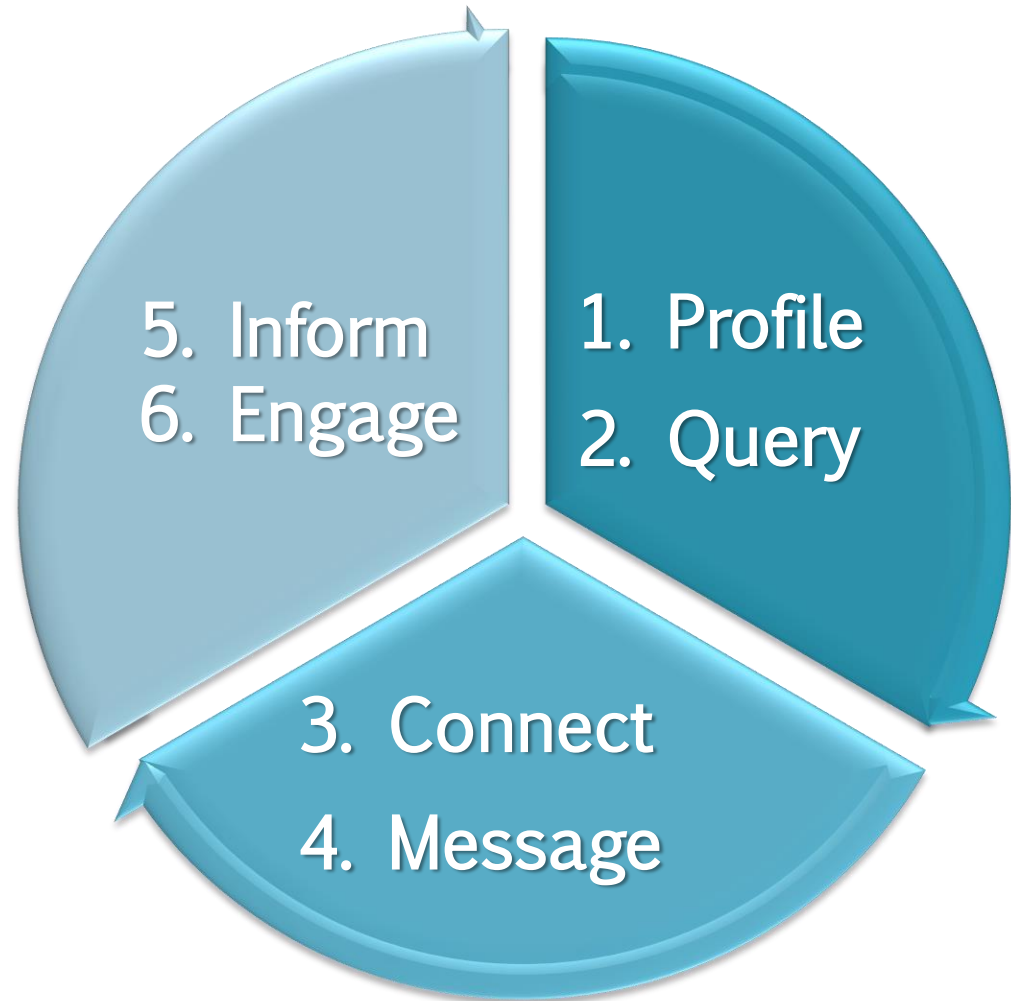


- 31% more team quotas met
- 29% more forecast accuracy
- 21% more rep quotas met

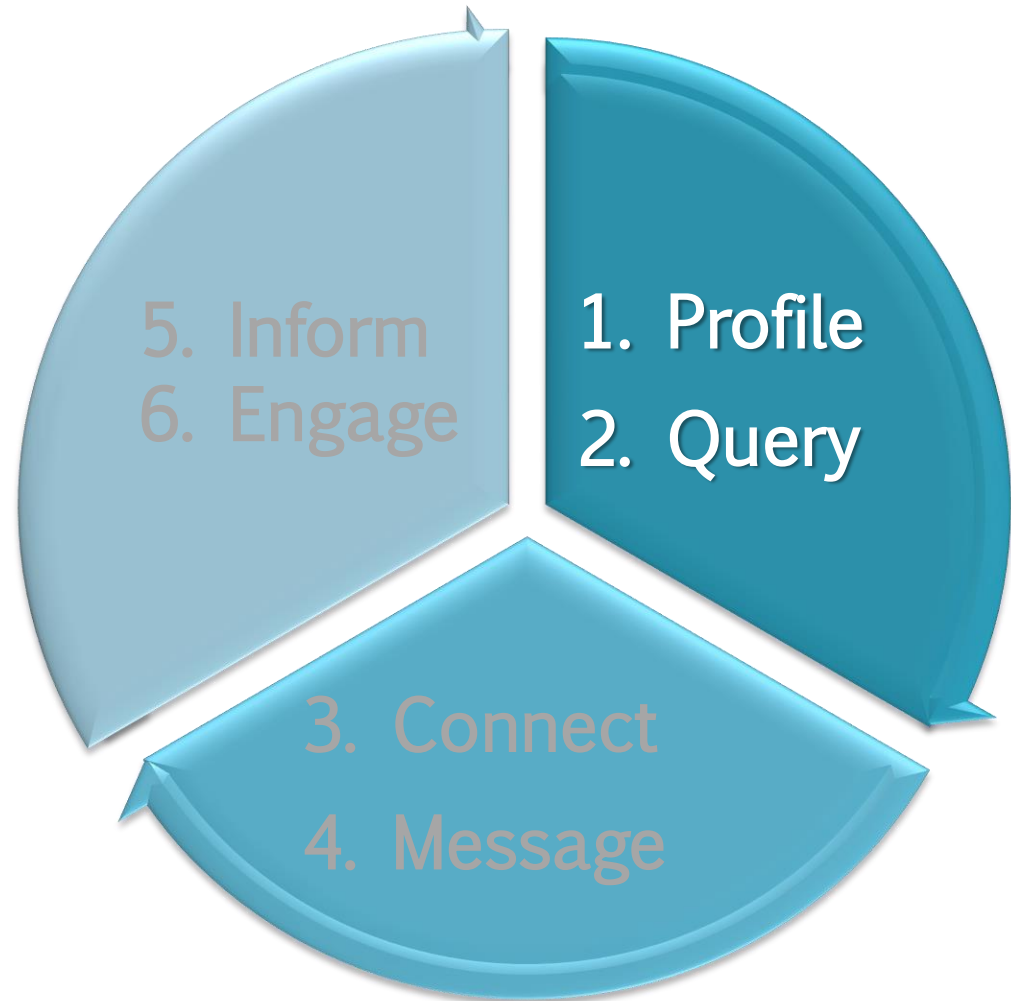
Figure 1: Current Performance Benefits of Social Selling



# Six Steps to Social Selling Excellence



# Six Steps to Social Selling Excellence



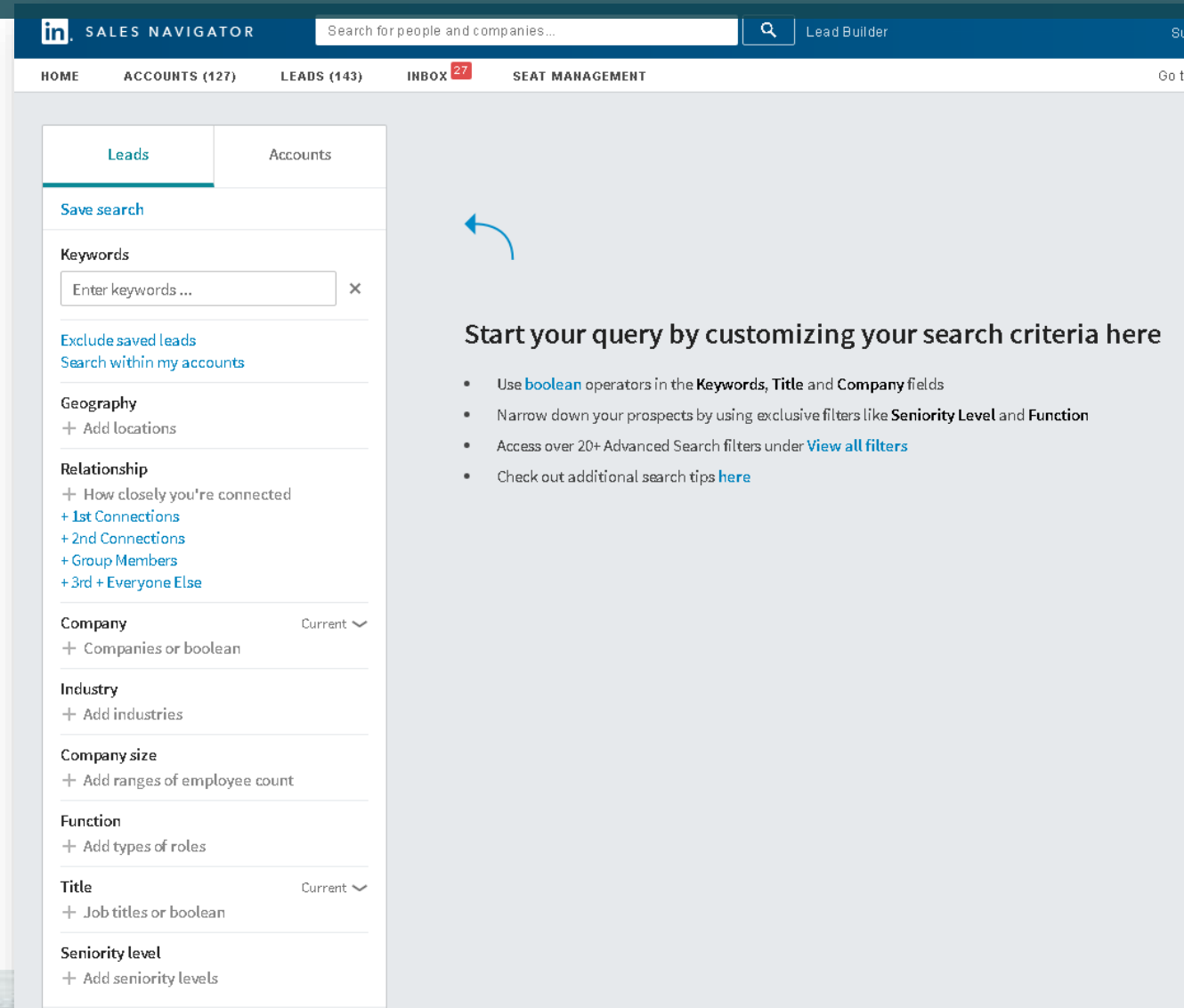
# Step 1: Profile

- Review Current Client Profiles
- Determine Optimal Type(s)
- Create Target Profiles

The screenshot shows the LinkedIn Sales Navigator interface for a profile of Ellen Lord. The top navigation bar includes 'SALES NAVIGATOR', a search bar, and 'Lead Builder'. Below the navigation bar are tabs for 'HOME', 'ACCOUNTS (127)', 'LEADS (143)', 'INBOX 27', and 'SEAT MANAGEMENT'. The profile header shows 'Ellen Lord', 'President & CEO at Textron Systems', and 'Providence, Rhode Island | Defense & Space'. It includes a profile picture, a '3rd' degree indicator, and a 'Saved' button. The 'Current positions' section lists 'President & CEO at Textron Systems'. The 'Previous positions' section lists 'SVP & GM Textron Defense Systems at Textron Systems' and 'SVP & GM AAI Corporation/Textron at Textron'. The 'Education' section lists 'University of New Hampshire'. Below the profile information are buttons for 'Export to Salesforce', 'Connect', and 'Send InMail' (with a '500+ connections' indicator). The 'Background' section is expanded, showing a 'Summary' with a detailed professional biography and 'Specialties' including 'Unmanned aircraft systems, munitions and sensors for defense and security applications'. The right sidebar features 'Tags' and 'Notes' sections, a 'How You're Connected' section showing 'You' and 'Steve Kenniston 1st', and a 'People also viewed' section listing 'Ian Walsh' and 'Kevin Holleran'.

# Step 2: Query

- Sales Navigator Search
- Type in keywords (Boolean)
- Select optimal filters



The screenshot displays the LinkedIn Sales Navigator search interface. At the top, there is a search bar with the text "Search for people and companies..." and a magnifying glass icon. Below the search bar, there are navigation tabs for "HOME", "ACCOUNTS (127)", "LEADS (143)", "INBOX 27", and "SEAT MANAGEMENT". The main content area is divided into two sections: "Leads" and "Accounts". The "Leads" section is currently active and shows a "Save search" button, a "Keywords" input field with a placeholder "Enter keywords ..." and a clear button, and several filter categories: "Exclude saved leads" and "Search within my accounts", "Geography" with a "+ Add locations" button, "Relationship" with options like "+ How closely you're connected", "+ 1st Connections", "+ 2nd Connections", "+ Group Members", and "+ 3rd + Everyone Else", "Company" with a "+ Companies or boolean" button and a "Current" dropdown, "Industry" with a "+ Add industries" button, "Company size" with a "+ Add ranges of employee count" button, "Function" with a "+ Add types of roles" button, "Title" with a "+ Job titles or boolean" button and a "Current" dropdown, and "Seniority level" with a "+ Add seniority levels" button. A blue arrow points from the text "Start your query by customizing your search criteria here" to the "Keywords" input field.

Start your query by customizing your search criteria here

- Use **boolean** operators in the **Keywords**, **Title** and **Company** fields
- Narrow down your prospects by using exclusive filters like **Seniority Level** and **Function**
- Access over 20+ Advanced Search filters under [View all filters](#)
- Check out additional search tips [here](#)

# LinkedIn Target Filters Example

Type	
Title	CIO, CFO, CEO, VP Finance
Seniority Level	CxO, Partner, Owner, VP
Job Description	Company or LOB executive management
Years of Experience	More than 10 years
Company Size	201+
Industry	Accounting, Banking, Financial Service
Geography	Greater San Diego Area
Education	Typically Masters (MBA, etc.)
Key Influencers	Board of Directors, shareholders, LOB, IT, IS
Company Type	Public Company, Privately Held
Function	Accounting, Finance
Keywords	Strong, control, forceful, demanding, confident, super



Filter your search 0 results Search x

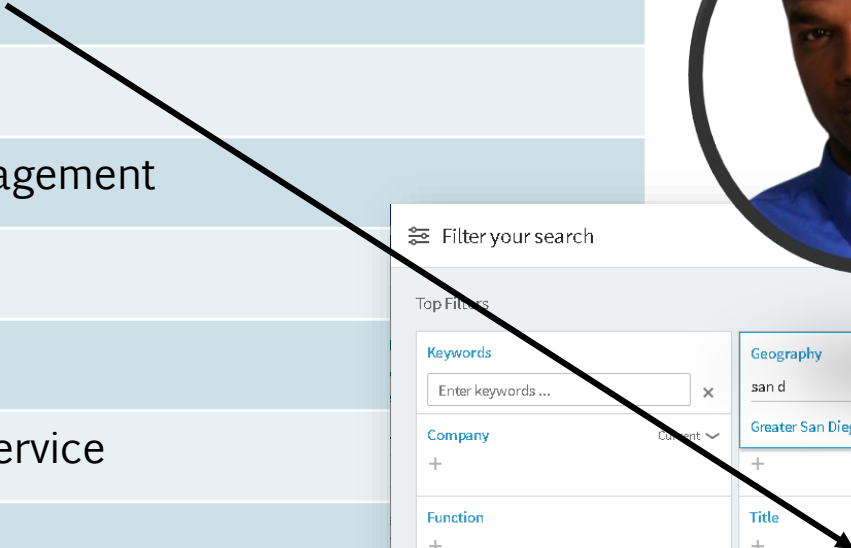
Top Filters

<b>Keywords</b> <input type="text" value="Enter keywords ..."/> x	<b>Geography</b> san d Greater San Diego Area	<b>Relationship</b> +
<b>Company</b> +	<b>Title</b> +	<b>Company size</b> +
<b>Function</b> +	Current v	<b>Seniority level</b> +

Other Advanced Filters

Postal code +	School +	Groups +
Years in current position +	Years at current company +	Years of experience +
Past company +	Company type +	First name +
Last name +	Profile language +	Member since +

Posted content keywords  
 x

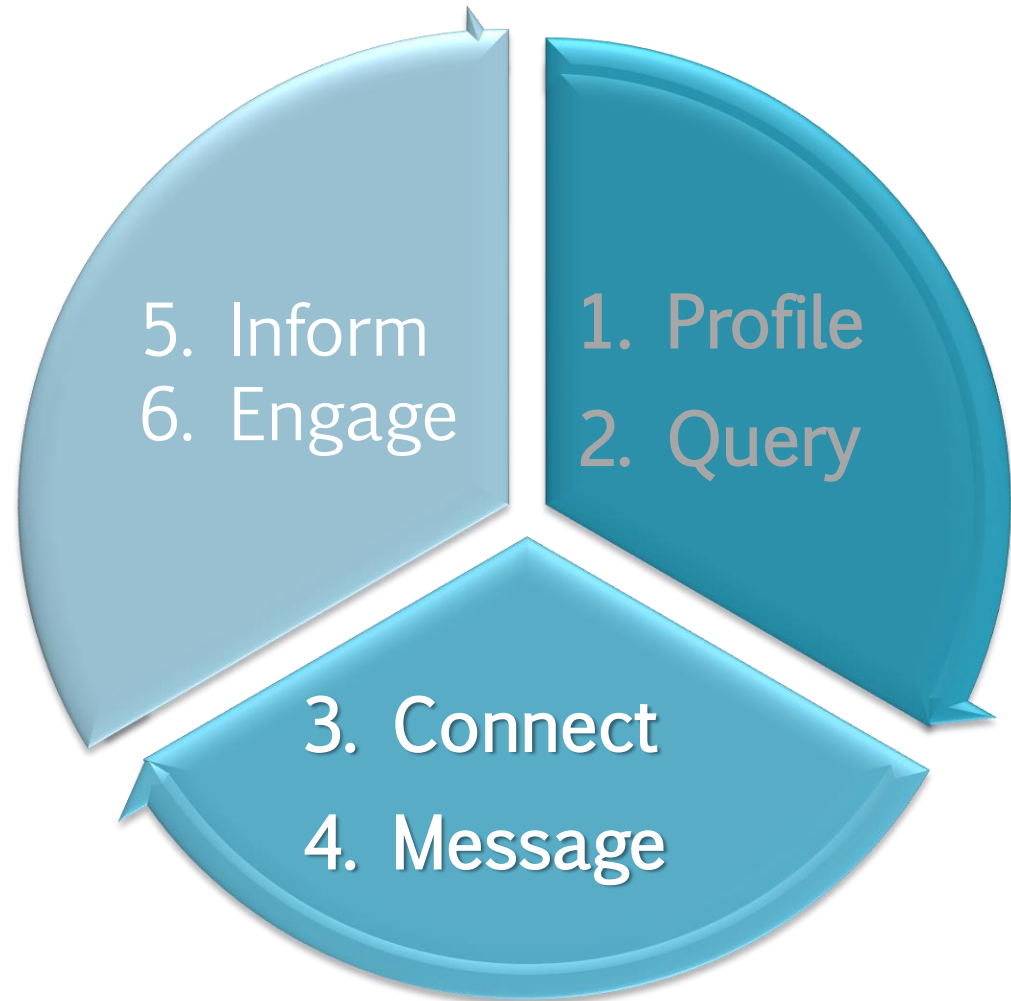


# LinkedIn Target Filters

Type	
Title	COO or CFO or Sales or Marketing or Development or Operations or Technology or Security or IT
Seniority Level	C-Level or VP or Director or Manager
Geography	San Francisco Bay Area
Company Size	201-500, 500-1000, 1001-5000
Industry	E-Learning, Higher Education' Accounting, Banking, Biotechnology, Broadcast Media, Capital Markets, Electrical/Electronic Manufacturing, Financial Services, Hospital & Health Care, Insurance, Investment Banking, Investment Management, Legal Services, Media Production, Medical Devices, Nonprofit Organization Management, Pharmaceuticals, Philanthropy, Publishing, Venture Capital & Private
Years of Experience	3 to 5 years, 6 to 10 years, More than 10 years
Company Type	Public Company, Privately Held
Function	Finance, Operations, Program and Project Management, Product Management, Sales, Marketing, Information Technology
Keywords	Salesforce OR GRC OR compliance OR security OR technology OR development OR CRM OR IT OR IS OR applications OR audits OR regulations



# Six Steps to Social Selling Excellence



# Step 3: Connect

**ACT I**  
**Like Me**

- Edit personal profile
- Create relevant group(s)
- Create “Like Me” messaging

The screenshot shows the LinkedIn interface for the 'IT & IS Execs' group. At the top, there's a navigation bar with 'My Groups' and 'Discover' tabs, a search bar, and a settings icon. A notification banner states: 'We are redesigning the Groups Management Page. Learn more here.' Below this, the group header shows the group name 'IT & IS Execs' with 3,924 members and a 'Manage' button. The main content area features a 'Start a conversation with your group' section with a text input field. Below that, there are tabs for 'Conversations' and 'Jobs'. A featured post by William Craig Reed is visible, titled 'Announcement from IT Execs', with 'Like' and 'Comment' buttons. At the bottom, there's a 'Reply to this conversation...' input field. On the right side, there's a sidebar with 'ABOUT THIS GROUP' text, 'Group rules', 'MEMBERS' (3,924 members), and an 'Invite others' button. At the very bottom of the sidebar, there are 'Ads You May Be Interested In' with three ad cards: 'Apply to be a mentor', 'Executive Resume Service', and 'SIEM Market Overview'.

# Step 3: Connect

**ACT I**  
**Like Me**

- Find common ground
- Find compelling reasons
- Use emotional keywords

**33%**  
**Connect**  
**Rate**

SALES NAVIGATOR Search for people and companies Lead Builder Support

HOME ACCOUNTS (127) LEADS (143) INBOX 27 SEAT MANAGEMENT Go to LinkedIn.com

Connect Invitation

Personalize your invitation to Ellen

**Ellen Lord** 3rd  
President & CEO at Textron Systems  
Providence, Rhode Island | Defense & Space

USE "LIKE ME" MESSAGING, EMOTIONAL DRIVERS, KEYWORDS, MUTUAL CONNECTIONS, COMPELLING REASONS, ETC.

Send Invitation Cancel

Contact Info

Background

Summary

A high-energy, business results focused leader with exceptional communication skills. Track record of motivating diverse teams around high priority objectives with a commitment to ethical business practices. High-tech industry experience ranging from automotive to aerospace & defense. A history of program capture including the ACAT 1 Scorpion program with the Army as well as leading the business that first obtained Army Fuze Board approval for an unattended networked munition system. Experience with unmanned aircraft system development, fielding and sustainment. A history of plastics engineering for safety critical automotive systems. History of mentoring and developing leaders.

Specialties: Unmanned aircraft systems, munitions and sensors for defense and security applications. Engineered plastics systems for automotive applications. Continuous improvement for high tech industries involved with complex solutions featuring embedded software solutions in customed engineered hardware systems.

connected

**Steve Kenniston** 1st  
Vice President Product Marketing  
Ask Steve about Ellen

This person knows 1 or more people who can introduce you to Ellen Lord

**Ellen Lord** 3rd  
Send InMail

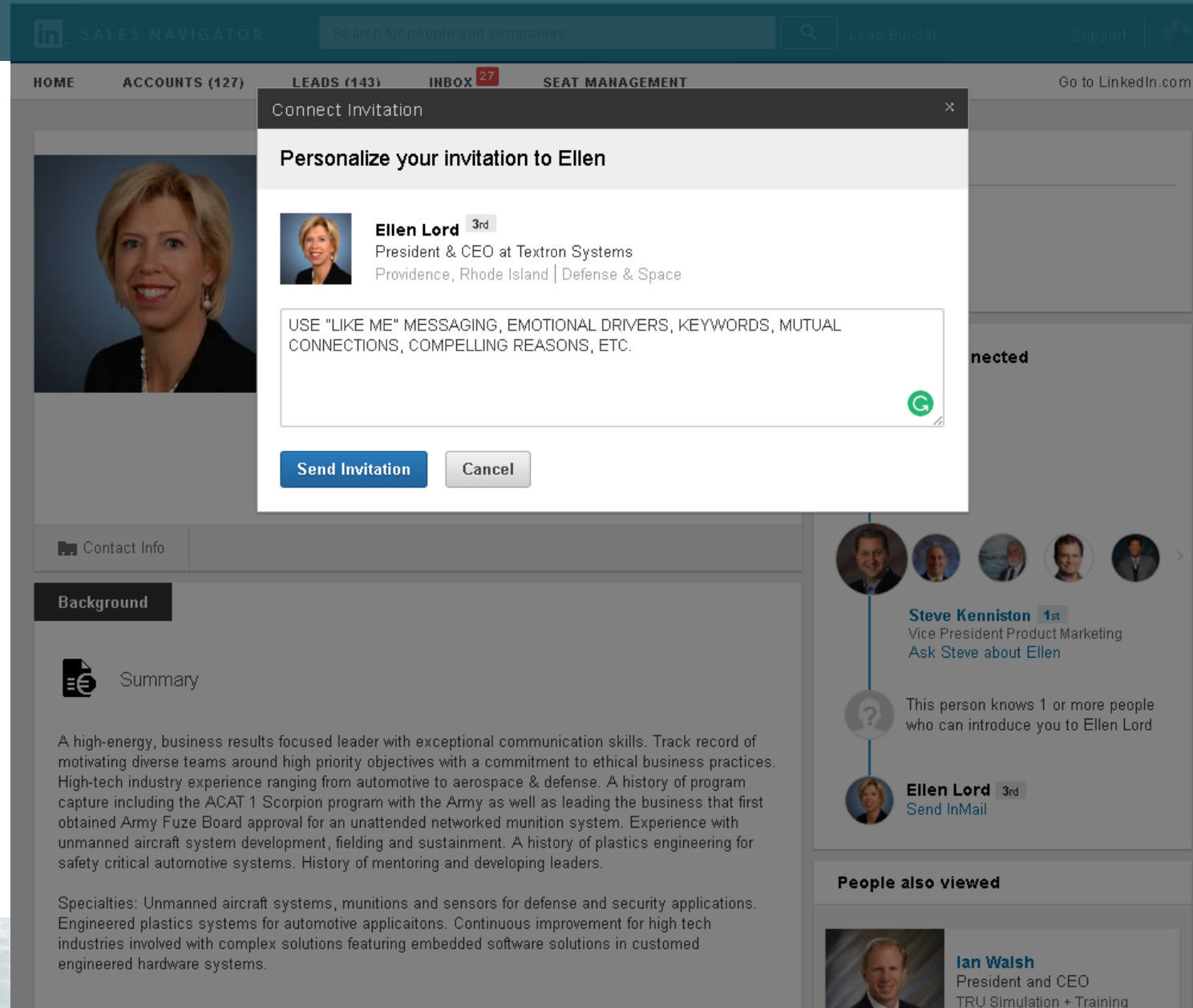
People also viewed

**Ian Walsh**  
President and CEO  
TRU Simulation + Training

# Step 4: Message

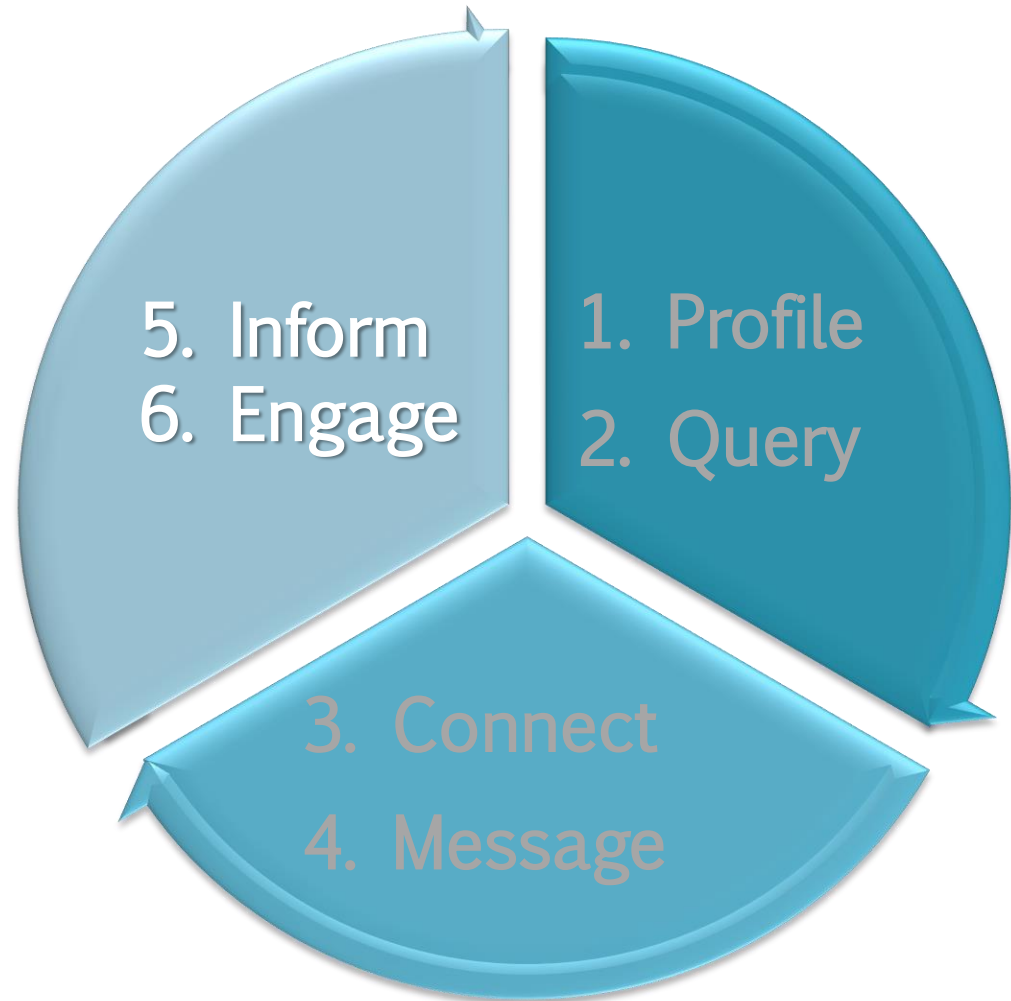
## Connect Messages:

- I noticed we're both in the LinkedIn XYZ Group and thought we should Connect.
- We have some mutual 1<sup>st</sup>-Level LinkedIn Connects so I thought we should Connect.
- I'd like to Connect so I can invite you to join our exclusive LinkedIn ABC Group.



The screenshot displays the LinkedIn Sales Navigator interface. At the top, there are navigation tabs for HOME, ACCOUNTS (127), LEADS (143), INBOX (27), and SEAT MANAGEMENT. A search bar is visible with the text 'Search for people and companies'. Below the navigation, a profile card for Ellen Lord is shown, including her profile picture and a 'Contact Info' tab. A 'Connect Invitation' dialog box is open, titled 'Personalize your invitation to Ellen'. The dialog contains a text area with the prompt: 'USE "LIKE ME" MESSAGING, EMOTIONAL DRIVERS, KEYWORDS, MUTUAL CONNECTIONS, COMPELLING REASONS, ETC.' and two buttons: 'Send Invitation' and 'Cancel'. To the right of the dialog, a 'People also viewed' section is visible, showing profiles for Steve Kenniston and Ian Walsh.

# Six Steps to Social Selling Excellence



# Step 5: Inform

**ACT II**  
**Trust Me**

- Use “Trust Me” messaging
- Include R-Complex drivers
- Offer something free

The screenshot displays the LinkedIn Sales Navigator interface. At the top, there's a search bar and navigation tabs for HOME, ACCOUNTS (127), LEADS (143), INBOX (27), and SEAT MANAGEMENT. Below this, a section titled "Lead recommendations at WhiteHat Security" shows three lead cards for Mike Goldfog, Dave Gerry, and Craig Hinkley, each with a "Save as lead" button. The main profile view is for Matt Handler, Senior Vice President of Global Sales at WhiteHat Security. His profile includes a photo, current and previous positions, education at Boston College, and buttons for "Export to Salesforce", "Send message", and "Saved". A "Background" section is visible below the profile. On the right, there are sections for "Tags (1)" (Security Prospect), "How You're Connected" (showing a connection to Matt Handler), and "People also viewed" (listing David M. Boy and Dave Gerry). A "Send message - Matt Handler" dialog box is open, showing a text input field and a "Send" button. A lightbulb icon with the text "Start a meaningful conversation with these icebreakers, and increase your InMail response rate!" is also present in the dialog.

# Step 5: Inform

## Inform Messages:

- I thought you'd be interested in this great article about [topic]. [link]
- I thought you'd like to read about this company that had [consequence]. [link]
- If you're thinking about [topic], I recommend you read this article. [link]

The screenshot displays the LinkedIn Sales Navigator interface. At the top, there's a search bar and navigation tabs for HOME, ACCOUNTS (127), LEADS (143), INBOX (27), and SEAT MANAGEMENT. Below this, a section titled "Lead recommendations at WhiteHat Security" shows three lead cards for Mike Goldgot, Dave Gerry, and Craig Hinkley, each with a "Save as lead" button.

The main profile view is for Matt Handler, Senior Vice President Of Global Sales at WhiteHat Security. His profile includes a photo, name, title, location (San Francisco Bay Area), and industry (Information Technology and Services). It lists his current position and previous roles at Sumo Logic and TIBCO Software Inc. There are buttons for "Export to Salesforce", "Send message", and "Saved". A "Background" section is visible below the profile, along with a "Summary" section containing a detailed description of his experience.

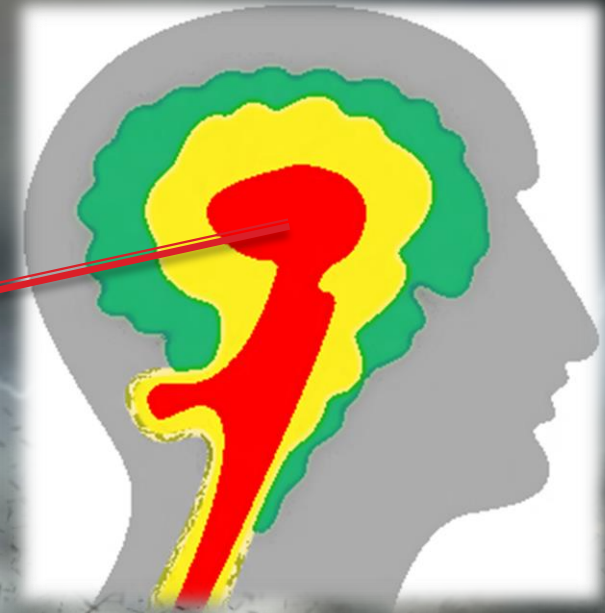
On the right side, there are sections for "Tags (1)" with a "Security Prospect" tag, "How You're Connected" showing a connection to "You", and "People also viewed" featuring profiles for David M. Boy and Dave Gerry.

A "Send message - Matt Handler" dialog box is open in the foreground, showing a text input field with the placeholder "Click here to write your message." and a "Send" button at the bottom right. A promotional message about InMail response rate is also visible in the dialog.



# Unknown Urgent Risks

*Old School = Value Propositions  
New School = R-Complex Messaging*



*ANXIETY INCREASES  
NOREPINEPHREIN & CORTISOL*



# Step 6: Engage

## ACT III Believe Me

- Create “Believe Me” Messaging
- Include logical keywords
- Use Call to Action



## Webinar Registration



**Topic** Neuron Social Selling Webinar

**Description** Are you in sales, marketing, or related field? Are you relying only on "old school" selling tactics including emails, cold calls, trade shows, downloads, etc? Are you ready to become a "rock star" with LinkedIn Sales Navigator and achieve...

- 375% LinkedIn Connect Rate Increase
- 212% Higher Lead Conversion Rates
- 80% Lower InMail Costs
- 60% More Sales Team Quota Attainment
- 29% Social Selling Index Improvement

Taking advantage of social selling can increase sales quota attainment by 31% (Aberdeen Group). The Neuron Social Selling webinar can help you double that. It's for pros or partners in sales, management, channel or OEM, demand gen, training or enablement, marketing, etc. This webinar includes best practices, case studies, templates, and deliverables that can immediately accelerate social selling results. Developed over a decade and field-proven with industry-leading firms, Neuron Social Selling has delivered impressive results by empowering unique neuroscience-based sales messaging, sales enablement, advanced social selling techniques, and prospect nurturing.

Attendees will learn how to lower InMail costs by 80% using just one technique that can also increase Connect rates by 375%. Attendees also get access to a NEURON PROFILING APP that matches your Neuron Profile with your prospects' to create a social selling best practices messaging and sales guide.

# Step 6: Engage

## Engage Messages:

- I noticed you read the article I recommended about [topic] and thought you'd like to join us for a special webinar on this topic...[link]
- If you'd like to learn how to avoid [consequence], consider joining our next webinar...[link]
- We're hosting a special event at Stone Brewery on 8/1/17 at 6pm, would you like to join us? [link]

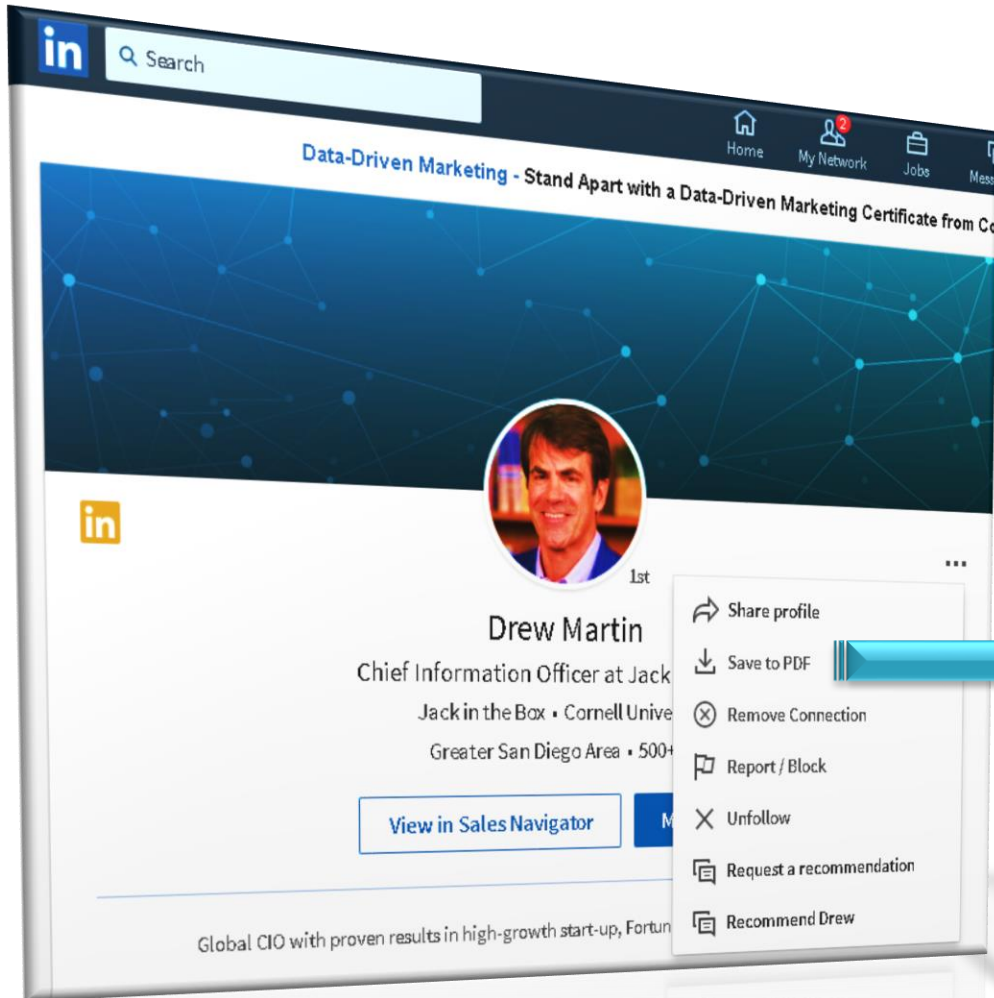


## Webinar Registration



<b>Topic</b>	<b>Neuron Social Selling Webinar</b>
<b>Description</b>	<p>Are you in sales, marketing, or related field? Are you relying only on "old school" selling tactics including emails, cold calls, trade shows, downloads, etc? Are you ready to become a "rock star" with LinkedIn Sales Navigator and achieve...</p> <ul style="list-style-type: none"><li>■ 375% LinkedIn Connect Rate Increase</li><li>■ 212% Higher Lead Conversion Rates</li><li>■ 80% Lower InMail Costs</li><li>■ 60% More Sales Team Quota Attainment</li><li>■ 29% Social Selling Index Improvement</li></ul> <p>Taking advantage of social selling can increase sales quota attainment by 31% (Aberdeen Group). The Neuron Social Selling webinar can help you double that. It's for pros or partners in sales, management, channel or OEM, demand gen, training or enablement, marketing, etc. This webinar includes best practices, case studies, templates, and deliverables that can immediately accelerate social selling results. Developed over a decade and field-proven with industry- leading firms, Neuron Social Selling has delivered impressive results by empowering unique neuroscience-based sales messaging, sales enablement, advanced social selling techniques, and prospect nurturing.</p> <p>Attendees will learn how to lower InMail costs by 80% using just one technique that can also increase Connect rates by 375%. Attendees also get access to a NEURON PROFILING APP that matches your Neuron Profile with your prospects' to create a social selling best practices messaging and sales guide.</p>

# LinkedIn Profile Analysis



75%	<b>Drew Martin</b>		
10	Chief Information Officer at Jack in the Box		
	<b>Summary</b>		
0	Global CIO with proven results in high-growth start-up, Fortune 50, board and consulting roles.		
	<b>Experience</b>		
20	<b>Chief Information Officer at Jack in the Box</b>		
	November 2016 - Present (4 months)		
	<b>Owner at Silicon Beach Advisors, Inc.</b>		
	January 2015 - Present (2 years 2 months)		
	<b>Chair of the Board of Directors at Santa Fe Christian Schools</b>		
	July 2014 - Present (2 years 8 months)		
	<b>Advisory Board Member at Sharp HealthCare</b>		
	January 2006 - Present (11 years 2 months)		
	<b>Co-Founder and President of Advisory Board at Seenager   Aging In Place   Senior Villages</b>		
	January 2015 - Present (2 years 2 months)		
	<b>EVP and CIO at Lytx Inc.</b>		
	October 2011 - December 2014 (3 years 3 months)		
	<b>SVP and CIO at Sony Electronics US</b>		
	January 2006 - September 2011 (5 years 9 months)		
	<b>VP of IT at Sony Electronics</b>		
	June 2002 - March 2005 (2 years 10 months)		
	<b>Director of IT at PepsiCo</b>		
	December 1993 - May 2002 (8 years 6 months)		
	<b>Manager at Accenture</b>		
	1990 - 1992 (2 years)		
	<b>Professional Basketball Player at Irish Basketball Association</b>		
	1988 - 1989 (1 year)		
	<b>Skills &amp; Expertise</b>		
5	<b>IT Strategy Strategy Leadership</b>		
5	<b>Product Management Agile Methodologies Mobile Computing Big Data</b>		
0	<b>Cloud Computing Pre-IPO</b>		
5	<b>Business Intelligence Information Technology Vendor Management IPO</b>		
0	<b>ERP</b>		
5	<b>Cross-functional Team Leadership Team Leadership</b>		
0	<b>Consulting</b>		
5	<b>Process Improvement Program Management IT Management</b>		
0	<b>CRM</b>		
0	<b>Integration</b>		
5	<b>Change Management PMO</b>		
5	<b>Business Process Improvement Project Management</b>		
0	<b>Business Strategy Strategic Planning Outsourcing Business Analysis Team Building Disaster Recovery</b>		
0	<b>Product Development</b>		
0	<b>Business Continuity Planning</b>		

# Prospect Scoring & CRM Integration

Target Title	Keywords	Score #	Target Industries	Score #	Function	Score #	Seniority Level	Score #	Target Education	Score #	Target Employees	Score #	Geographies	Score #	Keywords	Score #
Operations		5	Airlines/Aviation	10	Operations	10	CxO	20	Bachelor	5	1-10 employees	0	Greater San Diego Are	15	Manufacturing	10
Manufacturing		5	Automotive	10	Finance	5	Partner	15	Masters	10	11-50 employees	0	Orange County, Califor	10	Facility	10
Plant		5	Medical Devices	10	Sales	5	Owner	15			51-200 employees	5	Los Angeles County	5	Maquilladora	10
President		10	Electrical/Electronic Manufactu	10	Business Development	5	Vice President	10			201-500 employees	10	United States	0	Plant Management	10
Supply Chain		10	Aviation & Aerospace	10	Quality Assurance	5	Director	5			501-1,000 employees	15		0	Program Management	5
Finance		5	Computer Hardware	5	Product Management	5	Manager	5			1001-5000 employees	5		0	Quality Assurance	5
Supply Chain		10	Consumer Electronics	5		0		0			5001-10000 employees	0		0	Supply Chain	5
CEO		0	Consumer Goods	5		0		0			10,001+ employees	0		0	Executive	5
<b>SCORE</b>		<b>10</b>		<b>10</b>		<b>10</b>		<b>20</b>		<b>10</b>		<b>15</b>		<b>0</b>		<b>80</b>



**Lead Detail**

[Edit](#)
[Delete](#)
[Convert](#)
[Clone](#)
[Find Duplicates](#)
[Eltrophy DSPB](#)

---

**Lead Owner** [Bill Reed \[Change\]](#)

**Name** Mr. Brad Kidd

**Company** OnePoint Patient Care

**Title** CIO

**Lead Source** Web

**Industry** Healthcare

**Annual Revenue**

**Type** Privately Held

**Founded** 1969

**Address** 3006 S. Priest Dr.  
Tempe, AZ 85282

**Phone** (866) 771-6772

**Mobile**

**Fax**

**Email** [bkidd@oppc.com](mailto:bkidd@oppc.com)

**Website** <http://www.oppc.com>

**Lead Status** Open - Not Contacted

**Rating**

**No. of Employees**

**Size** 51-200 employees

**Number of Locations**

---

**▼ C2C Sales Dashboard Lead Profile**

**Role** Technical Decision Maker

**Social Network Link**

**Skills** Vendor Management, Business Continuity, Business, IT Strategy, IT Management, Outsourcing, Enterprise Software, Negotiation, Management, Strategy, Auditing, Leadership, Project Management, Process Optimization, Networking, Disaster Recovery, Start-ups, Technology Alignment, Information Technology, Technology, Telecommunications, Process Improvement, ITIL, VoIP, Data Center, Program Management, Go-to-market Strategy, Business Process Improvement, Product Management, Servers, Optimizations, Active Directory, Analysis, Microsoft Exchange, Infrastructure, Business Planning, Product Development, Commercialization, Technical Support, Windows Server, TCP/IP, Business – Technology alignment, Technology turnaround, Business suitability audits, Contract review and negotiation, Business continuity optimization, Risk analysis and mitigation

**Prospects at Company**

**Persons in Common** Jared Vishney, Carolyne Connor, Debbie Hall, PMP

**# of Connections**

**Personality** I am unique, creative, sensitive, romantic, and usually march to a different beat

**Twitter**

**Open to Call?**

**Social Connect**

**Survey Done**

**SocialIDPB**

**Profile Analysis** Technical Decision Maker

**Location**

**Summary** Dynamic information technology executive and program/project manager with uncompromised integrity, honesty and loyalty. Over 20 years of technical, business, and management experience, enhancing productivity and maximizing profitability with limited resources. \* Fanatical attention to customer service, process, and ROI. \* Keen focus on transforming information technology in the SMB market from a cost center to a strategic business asset. \* Excellent communicator and very fluent in the languages of both business and technology. **KEY ACCOMPLISHMENTS** \* Architected and managed complete information technology rebuilds, including LAN/WAN, Active Directory, Windows server farm, SAN system, disk based backup, disaster recovery/business continuity, line of business applications, Exchange, user desktops and mobile technology, as well as IT and business policy and procedure development. \* Lead a \$5 million IT cost savings program, reducing technology costs in excess of 10% over a 2-year period, returning the savings to the bottom line. \* Negotiated and managed vendor contracts in excess of \$1,000,000. \* Managed teams of analysts supporting over 4000 PCs and 160 servers in a 6-state region.

**Job Description 1** Responsible for overall IT strategic and tactical management of industry leading hospice specialty pharmacy.

**Working Dates 1** June 2014 - Present (1 year 6 months)

**Interests** Backpacking, Travel

**Degree 1** Bachelor of Science

**Degree Institution 1** University of Arizona

**Degree 2**

**Degree Institution 2**

**Languages** Italian

**Company Description**

---

**▼ C2C Sales Dashboard Lead Qualification**

# Dynamic Interactive Sales Playbook



## Keyword Menu

**Issues / Concerns**

- Audit / Assessment Concerns
- Backup Failures
- Budget Constraints
- Competitive Issues
- Compliance Concerns
- Cloud Concerns
- Data Loss
- Expertise Constraints
- Gaps in SW or HW
- Legal Concerns
- Project Complexities
- M&A Concerns
- Restore Failures

**Initiatives / Scenarios**

- Archiving
- Architecting Solutions
- Business Critical Apps
- Backup Improvements
- Compliance
- Critical Cloud Solutions
- Deployment of Solutions
- Disaster Recovery
- Education & Training
- Enterprise Vault

**Veritas Services**

- BUSINESS CRITICAL SVCS
- CONSULTING SERVICES
- EDUCATION SERVICES
- MANAGED BACKUP SVCS
- MANAGED ENT VAULT

### Veritas BDM 4 Services Playbook

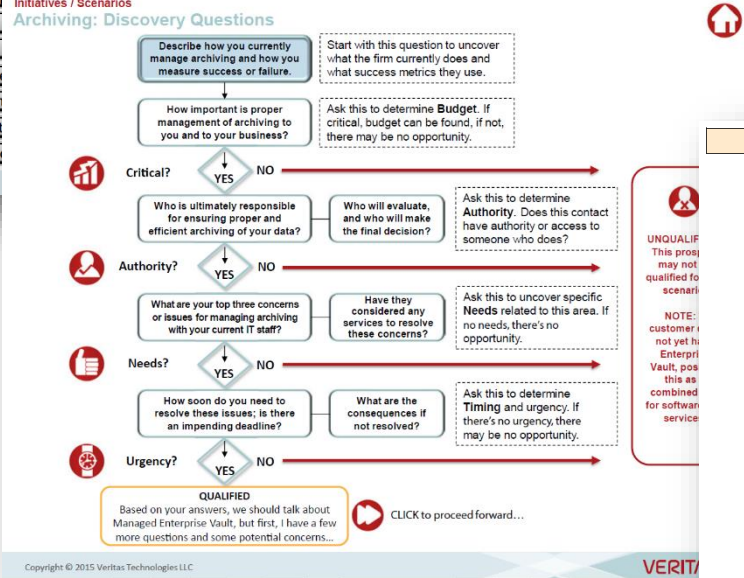
aventgroup+601363.veritas-bdm-4@eltropy.com

Services Customer Facing Assets

- Managed Enterprise Vault **UPDATED**
- Managed Backup Services **UPDATED**
- b-understanding-the-value-of-symantec-managed-enterprise-vault.pdf **UPDATED**
- veritas-mev-infographic-en.pdf **UPDATED**
- b-advisory\_delivering\_effective\_backup\_and\_recovery\_svcs\_03-2008.en-us.pdf **UPDATED**
- b-whitepaper\_preparing\_for\_the\_storm\_04-2008.en-us.pdf **UPDATED**
- veritas-mev-ebook-en.pdf **UPDATED**
- veritas-mbs-infographic-en.pdf **UPDATED**
- b-whitepaper\_measuring\_economic\_benefits\_of\_mbs\_02-2009\_20002636.en-us.pdf **UPDATED**
- veritas-mbs-ebook-en.pdf **UPDATED**

Services Training Courses

- Sales Skills PreReq Course



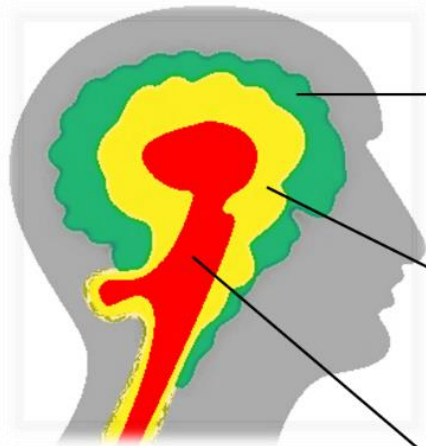
### VIII. Building Credibility

Customers and independent reviewers agree: join.me is the most intuitive, powerful, and easiest web conferencing solution available. It's the join.me experience that differentiates it from the legacy solutions, and why join.me has so much momentum and growth across all sizes of businesses. Here are some quick but powerful facts about join.me:

90% of Fortune 500™ companies use join.me for online meetings and collaboration	100%+ growth in 2014	50K new users/day fast growing solution
Best Value 2015	30M+ meetings in 2014	150K+ businesses
		LOGM LogMeIn \$1.4B

Customized & Just-in-time

# Neuron Personality Profile™



**Neocortex**  
**Logical Brain**  
 Head: "facts & figures"

**Limbic System**  
**Emotional Brain**  
 Heart: "feelings"

**Reptilian Complex**  
**Instinctual Brain**  
 Gut: "fight or flight"

## Prospect Neuron Profile Type: MOTIVATOR

### Your Prospect's Primary Fears:

- He can't stand the thought of failing at anything, underachieving, or being thought of as inferior or worthless. This both haunts and motivates him, and is the key to staying on his good side and avoiding the bad one. Try to avoid doing anything that will trigger your prospect's Primary Fears.

### Your Prospect's Primary Motivators:

- He is motivated by a desire to be recognized for his achievements, attain goals, and achieve success. He wants to reach his goals and be thought of as a success.

## Prospect Neuron Profile Type: MOTIVATOR

### Your Prospect's Typical Mannerisms:

- Confident, smiling, easy going, speaks with near-perfect diction like a radio host (quickly "pops" some phrases, like "let's talk a little bit about...")
- Dresses sharply to impress, likes designer clothes and fancy labels
- Will drive a Mercedes if at all possible or similar "status" car, not overly organized but not too messy

### Your Prospect Profile Overview

Your prospect is energetic and generally well-spoken, diplomatic and poised, but can also be competitive and may have a tendency to "over work." At his best, he is authentic, self-accepting, charitable, and strives to be a role model for other employees. He has the ability to achieve great things in his work environment, and when genuine, others may admire and respect his graciousness and professional accomplishments. He often strives to contribute the best of his abilities to his work, and enjoy motivating others to rise to their best and accomplish more than they thought possible. As such, he is usually well regarded by peers who appreciate his desire and motivation to help the firm attain its goals.

He is very goal oriented, highly organized, extremely hardworking, and usually decisive. He will tend to gravitate toward executive, leadership, or management roles. Free time is hard to come by, and he may actually feel guilty when not working. When he does relax, he might enjoy philanthropic volunteering or helping with a political campaign. He also likes athletic activities to stay fit and increase endorphins, and working on various hobbies or interesting projects.

### Key words to use frequently:

- Goals, success, perfect, momentum, accomplishment, confident, optimistic, achievement, recognition, driven, professional, polished, expedient, fast

# STRATEGIC WORKSHOP



NeuronLeaders