

Get more profitability from your existing customer base

Expand your customer base with the right resources and expertise

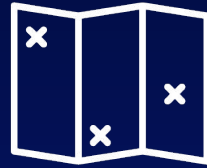
Bruce Guemmer, Chris Donlan, and Steve Ancheta

What's in it for you?

Get ready



Leverage the Tech Wheel to gain customer insights and increase sales



Boost revenue with tips from the pros and cross-selling strategies



Drive success with valuable resources and essential tools

Get ready to unlock game changing strategies

Join three President's Club winners



**Senior Manager,
Solution Engineering**



**Founder &
Managing Partner**



**Senior Training &
Development Manager**

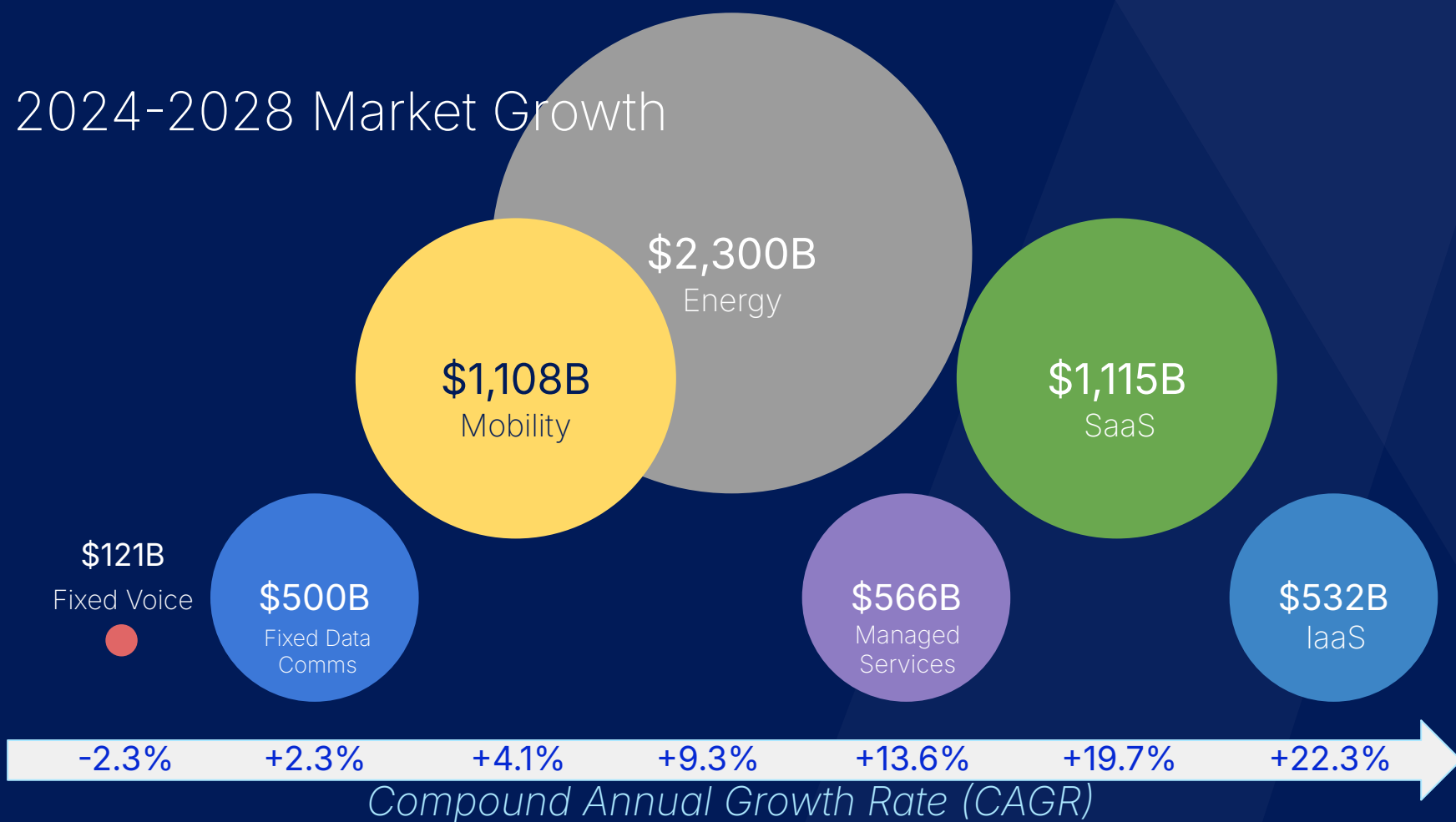




Leverage the Tech Wheel

Gain customer insights and increase sales

2024-2028 Market Growth



ENERGY

EV Charging | Water & Waste
Electricity | Natural Gas | Solar

CONNECTIVITY & SD-WAN/SASE

Fiber | Cable | Wireless | Satellite | TEM

MANAGED SERVICES

NOC | SOC | Professional Services
SmartSupport | Asset Management

SECURITY

Physical Security | Network Security
Endpoint Security | Cloud Security | SASE

CLOUD INFRASTRUCTURE

Public, Private, & Hybrid Cloud
Data Center & Colocation | Disaster Recovery

SOFTWARE AS A SERVICE

Microsoft | Google | ERP | CRM | Productivity | Business
Applications | IT Management | BI

MOBILITY & IoT

Wireless Services | Internet of Things (IoT)
Managed Mobility | Expense Management (WEM)

CUSTOMER EXPERIENCE (CX)

UCaaS | Contact Center | CPaaS | SMS
Analytics | Artificial Intelligence (AI)



The Technology Wheel

Which category is your main focus now?

- Why is it crucial to cross-sell within your existing customer base?
- Who has used the Tech Wheel with a customer? How did you use it?
- Customers are buying elsewhere; why not from you?
- Lost revenue when customers don't know they can buy from you



Uncover cross-sell opportunities

How are your customers using X technology?

Let's do a Tech Wheel deep dive on how businesses are using each category



Uncover cross-sell opportunities

How are your customers using **Connectivity & SD-WAN/SASE**?

Share examples on how businesses use this category



Uncover cross-sell opportunities

How are your customers using **Mobility & IoT**?

Share examples on how businesses use this category



Uncover cross-sell opportunities

How are your customers using **Customer Experience (CX)**?

Share examples on how businesses use this category



Uncover cross-sell opportunities

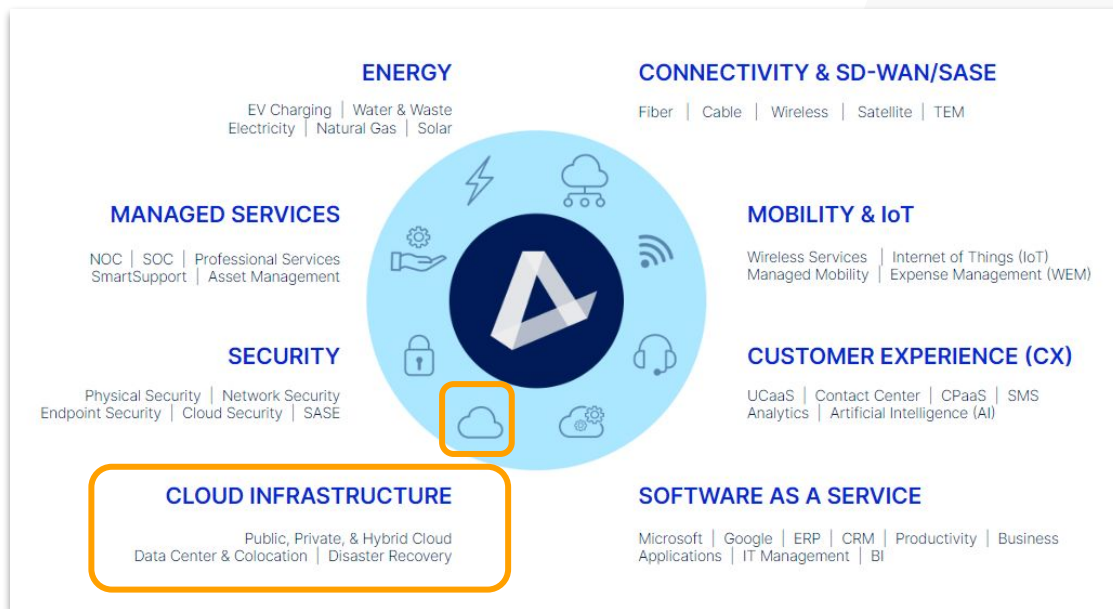
How are your customers using **Software as a Service (SaaS)**?

Share examples on how businesses use this category



Uncover cross-sell opportunities

How are your customers using **Cloud Infrastructure**?
Share examples on how businesses use this category



Uncover cross-sell opportunities

How are your customers using **Security**?

Share examples on how businesses use this category



Uncover cross-sell opportunities

How are your customers using **Managed Services**?
Share examples on how businesses use this category



Uncover cross-sell opportunities

How are your customers using **Energy**?

Share examples on how businesses use this category





Boost revenue

Tips from the pros and cross-selling strategies

Tech Wheel success stories

Steve Ancheta shares his Tech Wheel success

Discover cross-selling strategies

How does this help drive more business your way?



Steve Ancheta
Founder &
Managing Partner



Setting up the Technology Wheel conversation

"What technology categories are you exploring to boost productivity, manage change, or address risks within your organization?"

"How do these areas align with your key business objectives and contribute to your overall strategy?"





Q3 '24 Initiatives / SaaS Renewals

1. *Optimize our cloud spend: SPOT by NetApp*
10/21/24

Q4 '24 Initiatives / SaaS Renewals

1. *Optimize Microsoft 365 licenses for cost and scalability:*
12/2/24
2. *Enhance real-time visibility, network reliability & connectivity for all locations:*
SD-WAN



Q1 '25 Initiatives / SaaS Renewals

1. *Enhance asset tracking accuracy and operational visibility: IoT solution*
2. *Improve internal & external communications by unifying our voice, video & messaging onto single platform: UCaaS solution*

Q2 '25 Initiatives / SaaS Renewals

- 1.



Drive success

Valuable resources and essential tools

Technology Wheel conversations

Leverage your business conversations with powerful resources



TECHNOLOGY WHEEL CONVERSATIONS

Position new categories and maximize growth



CONNECTIVITY & SD-WAN

How well does your current network infrastructure support your business needs?
What connectivity challenges are affecting your operations, if any?
What are your top priorities for network reliability and performance?

MOBILITY & IOT

How do you prefer to manage sales calls and communication with your sales teams' mobile devices?
How do you manage your remote workforce and device challenges?
What changes would you like to put into your mobility platform?
How important is data-driven decision-making in your organization?
How can IoT drive your business success and growth?

CUSTOMER EXPERIENCE (CX)

What (methods) do you currently use for both internal and external communication?
How would you like to improve or enhance your customer experience overall?
How do you currently measure and assess customer satisfaction?
How is customer satisfaction impacted due to the complexity of maintaining multiple vendors and applications?

SOFTWARE AS A SERVICE

How do you procure your licenses today?
What challenges do you face in your current software license procurement process?
How do you currently manage users and permissions across your SaaS applications?
What solutions do you use to backup your Microsoft 365 and Google Workspace emails?
What software applications are critical to your daily operations and overall business success?

CLOUD INFRASTRUCTURE

What is your cloud strategy?
What challenges do you face when migrating or storing your data in the cloud?
What are your plans for scaling or securing mission-critical workloads?

SECURITY

What are the results of your most recent security assessment?
What specific challenges or gaps do you currently face in your security measures?
What compliance or regulatory issues are you dealing with today?
What is your current cybersecurity plan/strategy in place today to protect your customers?

MANAGED SERVICES

How does your staff engage with customers today and what limitations do you encounter?
How could an external perspective augment or complement the capabilities of your current staff?
How do you envision improving customer experience using your existing staff resources?

ENERGY

How has your business reacted to the significant uptick in energy expenses from previous years?
How would a cost-effective energy solution that could free up funds for other key projects interest you?
What steps are you considering to enhance your energy solutions?
How do you address energy needs?

TECHNOLOGY WHEEL DISCOVERY QUESTIONS



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MANAGE CHANGE

What changes have you experienced in your business recently?
How have these changes impacted your day-to-day operations/overall business performance?
What factors or drivers are motivating you to consider making changes?
What market pressures or external factors are driving the need for change (in your industry)?
What aspects of your business do you see changing?
Where do you see opportunities for investment and business expansion?
What are the anticipated business outcomes or results following these changes?
How are you actively gathering and understanding your customers' needs and preferences?
How are you preparing for upcoming changes in regulations/compliance requirements?
How has the recent (current event specific to industry) impacted your business strategies?

IMPROVE PRODUCTIVITY

Tell me about any areas where you may see inefficiencies within your work processes?
Where have you made changes or improvements in the past?
What were the specific outcomes or impacts observed from those changes/improvements?
What are some of the business result improvements you would prioritize for the next 18 months? How will you achieve these results?
What tools/resources would significantly enhance your employees ability to improve workflow?
What challenges currently impede productivity with your current workflow, if any?
How would you like to improve the end user experience? (employee, customer, partner)

MINIMIZE RISK

What is your overall plan for risk management?
What are the greatest risks for your business? How do you address them?
How do you ward off potential security threats?
Tell me about your disaster recovery plan if your system is out for any length of time?
What is the impact to your business if your system goes down?
How can poor network performance negatively impact your business?
Tell me about your specific plans to handle the unexpected interruptions?
Who manages your network infrastructure and ensures its reliability?
What is your contingency or backup plan if they are out or leave the company?

MAINTAIN A COMPETITIVE ADVANTAGE

What has made your business successful? What sets you apart?
Tell me about your competitors and the competitive landscape?
How do you differentiate yourself from your competitors? What is your value proposition?
How are your competitors leveraging technology to gain a competitive advantage?
Tell me about your top customers. What distinguishes them and how do they help you?
What strategies are you currently implementing/using to gain more market share?
What are your key considerations/approaches when entering a new market?

GENERAL BUSINESS QUESTIONS

What upcoming initiatives do you have?
How would you prioritize and rank them in order of importance?
What is your decision making process when evaluating/selecting initiatives or projects?
What is your purchasing criteria when making decisions?
What factors are most important to you when selecting a vendor/business partner?
What were you hoping to get out of this meeting? What were your goals/expectations?
What specific enhancements would you like to see within your organization/department?

BUSINESS DISCOVERY QUESTIONS



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Resources to help you sell

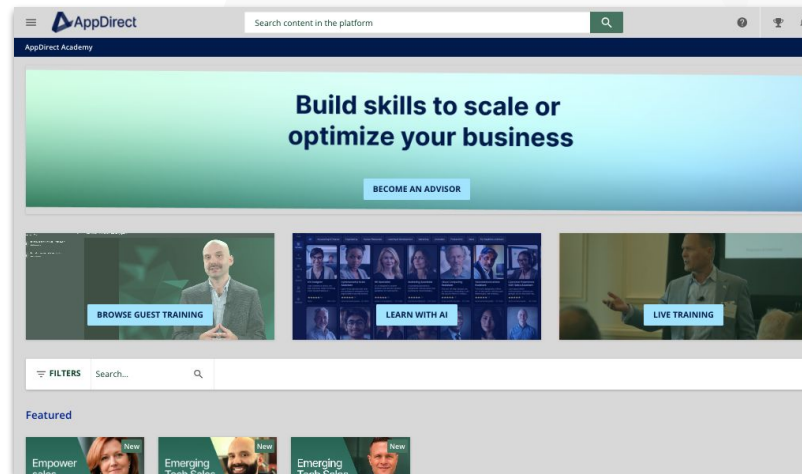
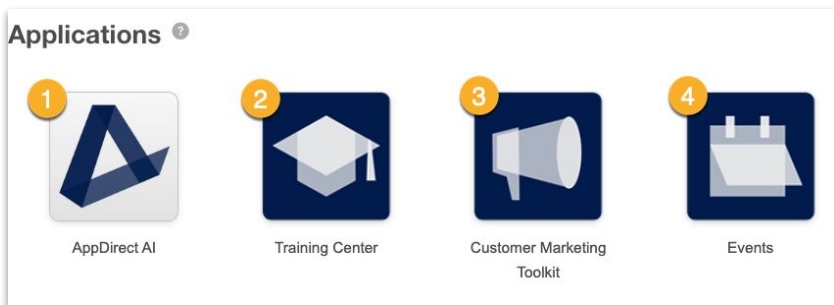
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Architect



Andrew Marshall
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Senior Solution
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Justin Foxwood
Solution Engineer



Kevin Hyed
Solution
Engineer



Michael Hamlin
CX Architect | Solution
Architect



Andy Potts
Sr Product Sales
Specialist



Cassidy McQuaid
VNOC Product
Sales Specialist



Jeff Moss
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David Landsberger
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Eric Hills
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Tanya Sheppard
Training & Education
Analyst



Bruce Guemmer
Sr Advisor
Enablement Mgr



Laura Jaffrey
Sr Advisor
Education Mgr



THRIVE24



Thank you for experiencing
Get more profitability from your customer base



Chris Donlan
Senior Manager,
Solution Engineering



Steve Ancheta
Founder &
Managing Partner



Bruce Guemmer
Senior Training &
Development Manager





Thank You

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