

TECHNOLOGY WHEEL CONVERSATIONS

Discovery Guide:
Position new categories
for growth



Technology Wheel conversations

START WITH THESE QUESTIONS TO SET IT UP:

"What technology categories are you considering to enhance productivity, manage change, or mitigate risks within your organization?"

"How do these areas support your key business objectives and overall strategy, and what's driving that alignment?" Or, simply just ask "why?"

See the next page for questions on the eight Technology Wheel categories

THE TECHNOLOGY WHEEL



ENERGY

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

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

CONNECTIVITY & SD-WAN/SASE

Fiber | Cable | Wireless | Satellite | TEM

MOBILITY & IoT

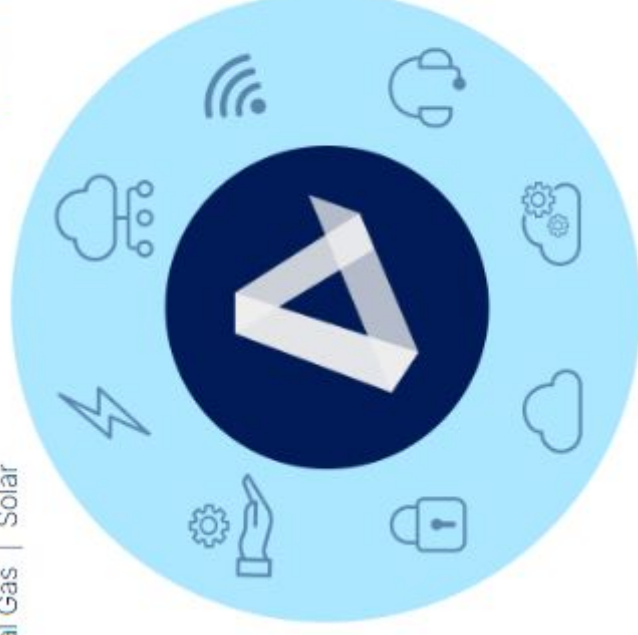
Wireless Services | Internet of Things (IoT)
Managed Mobility | Expense Management (WEM)

CUSTOMER EXPERIENCE (CX)

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

SOFTWARE AS A SERVICE

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



CONNECTIVITY & SD-WAN

How effectively does your current network infrastructure meet your business needs?

What connectivity challenges, if any, are hindering your operations?

What are your key priorities for ensuring network reliability and performance?

MOBILITY & IOT

Tell me about the company issued wireless devices provided to your employees today?

What tools do you use to track, monitor, and secure wireless data from theft, loss, or breaches?

What improvements would you like to see surrounding the use of wireless?

How are you leveraging connected devices to optimize operations and drive innovation?

How critical is to gather data from IoT devices to inform your strategic decisions?

CUSTOMER EXPERIENCE (CX)

What communication methods do you currently use for internal and external interactions?

How do you envision enhancing the overall customer experience?

How do you measure and evaluate customer satisfaction today?

How does managing multiple vendors and applications affect customer satisfaction?

SOFTWARE AS A SERVICE

How do you currently procure software licenses?

What challenges do you face in your current software license procurement process?

How do 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 essential for your daily operations and overall business success?

CLOUD INFRASTRUCTURE

What is your overall cloud strategy?

What challenges do you encounter when migrating or storing data in the cloud?

How you plan to scale or secure mission-critical workloads moving forward?

SECURITY

How do you feel about your current security posture?

What were the results of your last cybersecurity assessment?

What specific challenges or gaps are you currently facing in your security measures?

What compliance or regulatory issues are you navigating today?

What cybersecurity measures and strategies do you have in place to protect your customers

MANAGED SERVICES

How does your staff currently engage with customers, and what limitations do they face?

How could an external perspective enhance the capabilities of your existing staff?

How do you envision improving the customer experience with your current staff resources?

ENERGY

How has your business responded to the recent increase in energy costs?

How do you feel about exploring cost-effective energy solutions that might free up funds for other important projects?

What steps are you considering to improve your energy solutions?

How do you currently address your energy needs?



MANAGE CHANGE

What recent changes have impacted your business?
 How have these changes affected your daily operations or overall performance?
 What factors or drivers are motivating you to consider making changes?
 What industry pressures or external factors are driving your need for change?
 What aspects of your business do you see changing?
 Where do you see the biggest opportunities for growth or investment?
 What business outcomes or results are you hoping to achieve with these changes?
 How do you keep aligned with your customers' evolving needs and preferences?
 How are you preparing for upcoming regulatory changes and compliance requirements?
 How has the recent (industry-specific event) influenced your business strategies?

IMPROVE PRODUCTIVITY

What areas of your work processes do you feel could be more efficient?
 What changes or improvements have you implemented in the past?
 What specific outcomes or impacts did you achieve from those changes?
 What business improvements do you want to prioritize over the next 18 months, and how will you accomplish them?
 What tools or resources would most empower your employees ability to improve workflow?
 What challenges, if any, are currently hindering productivity in your workflow?
 How do you plan to enhance the experience for your employees, customers, and partners?

MINIMIZE RISK

What is your overarching strategy for managing risk? - What are the biggest risks facing your business, and how are you addressing them?
 How do you protect your business from potential security threats?
 Tell me about your disaster recovery plan if your system experiences downtime?
 What is the impact to your business if your system goes down?
 How can poor network performance negatively impact your business?
 What specific strategies do you have in place for managing unexpected disruptions?
 Who is responsible for managing your network infrastructure and ensures its reliability?
 What contingency plans do you have if that person is unavailable or leaves the company?

MAINTAIN A COMPETITIVE ADVANTAGE

What drives your business success, and what makes you unique?
 How would you describe your competitive landscape?
 How do you differentiate yourself, and what is your strongest value?
 How are your competitors leveraging technology to gain a competitive advantage?
 Who are your top customers, and why are they important?
 What strategies are you currently using to grow market share?
 What factors are key when you enter a new market?

GENERAL BUSINESS QUESTIONS

What upcoming initiatives are top priorities?
 w would you prioritize and rank them in order of importance?
 What is your process for evaluating and selecting initiatives or projects?
 What is your purchasing criteria when making decisions?
 What is most important to you when choosing a vendor or business partner?
 What were you hoping to gain from today's discussion (your expectations)?
 What specific enhancements do you want within your team or organization?



MS365 and SaaS application positioning questions

MS(Microsoft) 365

What are you currently using for email today?

How are you using Microsoft Office 365 and/or Google Workspace?

What is your current email solution not doing for you, if anything?

How do you procure your licenses today?

When was the last time you checked your mail licensing features to make sure it aligns with your needs and maximizes subscription benefits?

What mail backup solution are you leveraging?

What challenges are you currently experiencing?

What changes would you like to make, if any? And, why?

SaaS

How would bundling software licenses at the same cost for extra support and features benefit you? [Welcome to AppDirect]

How are you communicating and collaborating today (Internally, with customers, and vendors)?

What would you like to improve the way you are communicating, if at all?

What software applications are currently integral to your business operational success?

What other cloud software like DocuSign, Salesforce, Adobe, or Quickbooks Online are you using?



BACKUP FOR MAIL (Veeam for MS365)

What is your current backup strategy for your mail (Microsoft and/or Google)?

When does your contract end?

How familiar are you with Microsoft and Google's shared responsibility model (i.e., Microsoft and Google do not backup your data)?

AUTOMATE & OPTIMIZE AWS, AZURE AND GCP CLOUD INFRASTRUCTURE (Spot)

What is your current average monthly spend in the public cloud?

When was your last cost optimization exercise?

What systems are in place to identify and fit data with the correct workload or instance type?

What would some level of Cost Allocation Automation have to your Public Cloud spend?

How appealing is a zero-risk cost / DevOps optimization tool to your infrastructure leadership?

SECURE WORKFLOW AND COLLABORATION (Dropbox)

How do you currently work with large files that need to be accessed and shared from multiple devices or locations?

Tell me how you collaborate with other team members or clients on projects that involve file sharing and document collaboration?

How would a secure integrated file sync and share solution benefit you?

How are files that are shared both internally and externally protected?

What visibility and controls do you currently have today in regards to your employees sharing files?

What would you like to have that you do not today?

ENDPOINT PROTECTION, CLOUD WORKLOADS, IDENTITIES, AND DATA (CrowdStrike)

How do you protect against both malware and malware free attacks, ransomware outbreaks and identity based threats?

How many dedicated cyber security specialists do you have on staff?

What tools do you currently use to protect your organization from cybersecurity threats and how do those tools work together?

How do you know you've been breached?

How does your organization respond to and remediate breaches once they're identified?

EMAIL SECURITY, MALWARE, AND RANSOMWARE PROTECTION (Mimecast or Proofpoint)

How satisfied are you with your current email security measures?

How do you guard against phishing attacks and email fraud, including domain spoofing?

With increasing email threats, how do you protect sensitive information sent via email?

What policies do you have in place for handling suspicious or fraudulent emails, such as reporting them to IT or security personnel?

How do you ensure that employees are trained on email security and potential threats?



Security conversation starters

SECURITY BASICS

Annual Audit

Firewall Patching

Original Equipment Manufacturer (OEM) Support

Mail Security / Encryption / Phishing Training

Multi Factor Authentication (MFA)

Security Awareness Training

Endpoint Detection and Response (EDR)

SECURITY DISCOVERY QUESTIONS

How do you feel about your current security posture?

How prepared are you today for a cyber attack?

What is your plan for dealing with security issues? What is your incident response plan?

When there is a security issue, what do you do and who do you call?

What were the results of your last cybersecurity assessment?

How do you measure the effectiveness of your current security awareness training programs?

What initiatives are in place for enhancing the security awareness of your employees?

How do you manage and prioritize firewall patching within your network infrastructure?

What challenges or concerns do you face when conducting a comprehensive security audit, if any?



AppDirect Managed Services: Management and monitoring

NOC, PLATFORM AND MONITORING TOOLS

How do you currently monitor and manage your network?

Who handles network related problems when they occur?

What existing network monitoring tools do you currently use?

How are your monitoring tools integrated to automate ticketing and incident management?

How efficient is your team at identifying the root cause for IT issues?

How much time does your team spend managing network outages, identifying network issues, and pinpointing root causes for IT disruptions?

CLOUD INFRASTRUCTURE SERVICES (CIS)

How do you currently monitor and manage your cloud environment, both on-prem and in the cloud?

What are the challenges you encounter in managing your cloud environment?

How do you handle changes within your cloud environment?

What internal or outsourced NOC do you currently have in place?

What challenges, if any, have you experienced with managing your current infrastructure (e.g., scalability, maintenance, cost)?

How do you analyze your cloud spend and compare it to your subscriptions?



Energy conversation starters

How has your business reacted to the significant uptick in energy expenses from previous years?

How important is it to you to focus on energy reduction and energy cost control solutions for your business?

Who in your organization focuses on energy?

How have you looked at ways to reduce electricity usage, water usage, (and waste expenses)?

How do you feel about exploring cost-effective energy solutions that might free up funds for other important projects?

Please tell me about your company's sustainability or ESG (environmental, social, and governance) goals and objectives?

What do you know about the available federal/state/local utility incentives and rebates to assist with the implementation of sustainability solutions (for solar, LED, EV-charging)?



Firstbase

Manage the asset lifecycle of your customers

How do you currently manage employee equipment across different locations?

What challenges do you face when onboarding or offboarding employees with the right equipment?

Where do inefficiencies exist in your current asset tracking and retrieval process?

How much time does your team spend manually handling IT asset logistics?

What systems are you using to manage HR and IT workflows, and how well do they integrate?

Tell me more about your process for ensuring equipment security and compliance.

How would automating your asset lifecycle improve your team's productivity and cost savings?

Whats is your annual laptop loss rate? (industry standard is > 30%)



Copilot (MS365) and Gemini conversation starters

COPILOT

Tell me about your AI Strategy?

What strategies do you have in place for managing your data?

Where is your data stored, and how do you ensure its cleanliness?

How are you securing your data, and what measures have you taken for loss prevention?

What tools are you using for identity and access management?

How are you identifying business opportunities where AI can drive impact?

How are you training and reinforcing AI adoption in your employees' daily workflows?

Who is responsible for shaping and managing your AI strategy?

GEMINI

How can customers better integrate information from various sources like meetings, documents, and research?

How could automating repetitive tasks enhance your customer support?

How do you create and share training materials or internal knowledge resources, and where could the process improve?

If AI could enhance one aspect of your brainstorming, writing, or problem-solving, what would it be?

How could this AI platform elevate your overall employee experience?



AppDirect 2025 Technology Roadmap:_____

Q1 '25 Initiatives / SaaS Renewals

1.

Q2 '25 Initiatives / SaaS Renewals

1.



Q3 '25 Initiatives / SaaS Renewals

1.

Q4 '25 Initiatives / SaaS Renewals

1.