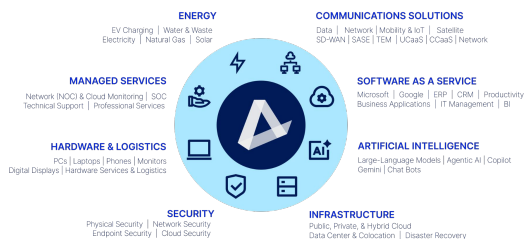


TECHNOLOGY WHEEL CONVERSATIONS

Discovery Guide:
Position new categories
for growth



Technology Wheel conversations

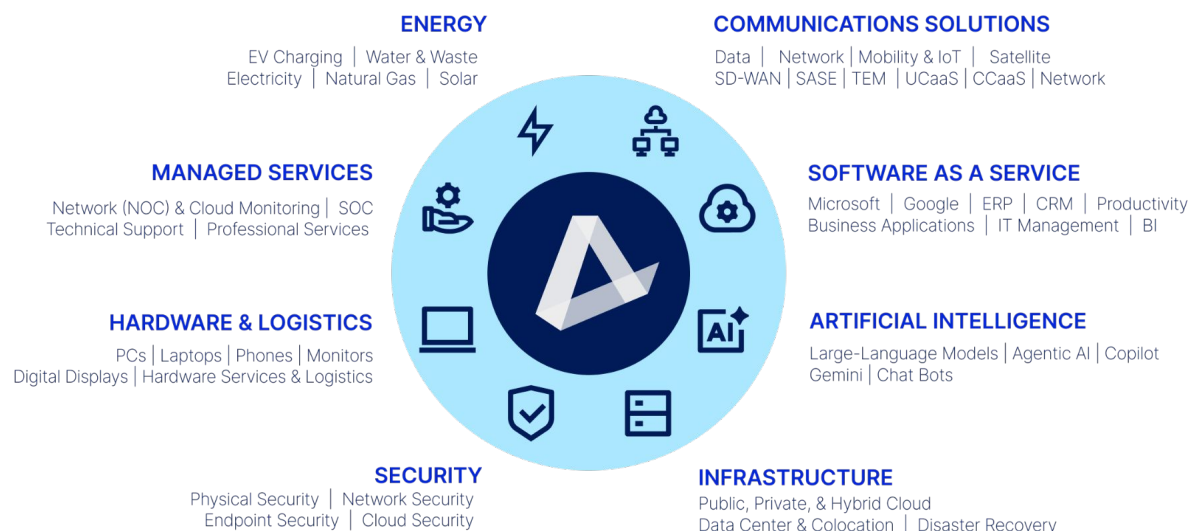
START WITH THESE QUESTIONS TO SET IT UP:

"What technology categories are you exploring 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 across the eight Technology Wheel categories

THE TECHNOLOGY WHEEL



ENERGY

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

MANAGED SERVICES

Network (NOC) & Cloud Monitoring | SOC
Technical Support | Professional Services

HARDWARE & LOGISTICS

PCs | Laptops | Phones | Monitors
Digital Displays | Hardware Services & Logistics

SECURITY

Physical Security | Network Security
Endpoint Security | Cloud Security

COMMUNICATIONS SOLUTIONS

Data | Network | Mobility & IoT | Satellite
SD-WAN | SASE | TEM | UCaaS | CCaaS | Network

SOFTWARE AS A SERVICE

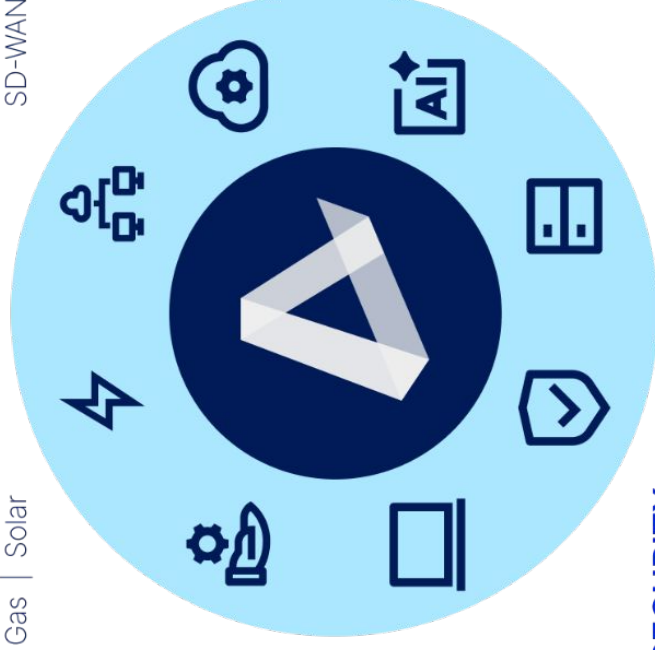
Microsoft | Google | ERP | CRM | Productivity
Business Applications | IT Management | BI

ARTIFICIAL INTELLIGENCE

Large-Language Models | Agentic AI | Copilot
Gemini | Chat Bots

INFRASTRUCTURE

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



COMMUNICATIONS SOLUTIONS

How seamless and secure is your current network in supporting remote and mobile workforces?

What steps are you taking to manage wireless costs and secure mobile devices?

How are you using IoT data to influence business decisions?

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

What challenges limit a consistent, personalized customer experience across multiple channels?

How much time is spent on communication vendors; what does ideal consolidation look like?

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

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?

HARDWARE & LOGISTICS

How effective is your current hardware supply chain and logistics?

What challenges have you faced in hardware procurement or inventory management?

How important is flexibility in logistics to your operations?

Which areas of hardware and logistics need improvement?

ARTIFICIAL INTELLIGENCE

How are you leveraging data analysis and AI applications to enhance your operations?

Tell me what areas of your business could benefit the most from AI driven automation?

How ready is your business infrastructure for adopting or expanding AI solutions?

What challenges have you faced in adopting AI?

What business outcomes do you hope to achieve by using AI more extensively?

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?

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?

ENERGY

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

How do you feel about exploring energy solutions that could free up budget for other priorities?

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

- ☐ What top SaaS solutions are you using today?
- ☐ Where are you buying them from?
- ☐ When is your term expiring?

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?



EMAIL BACKUP (Acronis for MS365 / OpenText for Google Workspace)

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)?

CLOUD COST OPTIMIZATION - AZURE, AWS, and GCP (Spot)

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

When was your last cloud cost analysis (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 COLLABORATION AND SHARING (Dropbox)

How do you protect shared files internally and externally?

How do you manage large files that need access across multiple devices or locations?

Tell me how you collaborate on shared documents with team members or clients?

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

How do you monitor and control employee file sharing?

How do you address gaps in your current file sharing capabilities, if any?

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

ENDPOINT PROTECTION (Coro / CrowdStrike / SentinelOne / Sophos)

How do you handle malware-free attacks and ransomware?

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

How do your current cybersecurity tools work together to protect your organization?

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 (Check Point / Mimecast / Proofpoint)

How do you guard against phishing and domain spoofing attacks?

How satisfied are you with your current email security measures?

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

What policies do you have in place to handle and report suspicious or fraudulent emails within your organization?

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

- ❑ Start with: "How do you currently monitor and manage your network today?"
- ❑ If cloud: "How do you manage your cloud environment today?"
- ❑ Based on their response, tailor your approach using the questions below

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, or local utility incentives that exist for solar, LED, or EV-charging projects?

What challenges have you faced in reducing water waste or improving water efficiency?



Firstbase

Manage the asset lifecycle of your customers
Empower your customers' hardware and logistics

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

COPILLOT

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:_____

Q4 '25 Initiatives / SaaS Renewals

1.

Q1 '26 Initiatives / SaaS Renewals

1.

2.



Q2 '26 Initiatives / SaaS Renewals

1.

2.

Q3 '26 Initiatives / SaaS Renewals

1.