

NCSC XXII Prospect Profiles 2020

Round 1, WCA, WCB



Quarter-Final Round

**Heart
Hotels**

Semi-Final Round



Note: Organizations represented in NCSC cases are fictitious but may have similar or the same names as real organizations. Information relevant to the NCSC competition cases are found ONLY in the case. Any information competitors may find on web sites or from other sources associated with the organization name should not be considered accurate or associated with NCSC cases.

Gartner

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Disclaimer: All prospect profiles are developed for educational purposes and to facilitate competition at NCSC XXII. While some organizations represented in the profiles resemble actual companies, the profiles and situations are purely fictitious, and any comments or remarks made in this document or by participants during the NCSC do not reflect the views, opinions or facts about any actual organization.

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Case Info

You have been with Gartner for 4 months and have been prospecting organizations over \$500 million in revenue and funding. Blue's information from Hoover's

2019 Fin. Information

Operating Revenue: \$639m

Expenditures Institutional Supp: \$42m

Property, Plant, Equip.: \$41m

Technology: \$12.2m

Payroll & Benefits: \$252m

The Sales Call

You attended a Gartner Customer Experience & Technologies Summit in Tokyo, Japan February 2019 and met Mike DiPietro, the Computer Network Architect for Blue Distributors. After pleasantries and getting to know each other a little, Mike suggested you connect with Jay Hilti, the CIO at Blue. It has taken you several months of emails and vm exchanges with Jay's admin to set up this appointment.

What you Found

Blue Distributors info from the website

At Blue Distributors delivering success is what our business is all about. As the leading building products distribution company in the industry, we provide the building blocks for residential and commercial construction, remodeling and repair, manufacturing, manufactured and modular housing, and homeowner projects. Look to Blue for quality products, reliable distribution, knowledgeable people and innovative ideas. Blue has the organization and systems to help our customers accomplish their goals, and we invite you to discover how much we can deliver.

Administrative Team from website:

President: Kendra Sewell (2011)

Chief Financial Officer: Judy Billups (2011)

Chief Operations Officer: Brent Baker (2011)

Chief Information Officer: Jay Hilti (2019)

Prospect Background

From LinkedIn: Jay Hilti

Successfully integrated IT infrastructure, enterprise applications, business processes, and cultures from 3 separate acquisitions; the company tripled in size from 2 manufacturing locations to 21 within 3 years (Paperworks)

Led the financial systems integration of 2 acquisitions, including Multicurrency functionality and new enterprise wide Chart of Accounts (WestRock)

Previous Work Experience

VP IT, PaperWorks Industries (3 yrs 3mos)

Dir. Ops, Recycle Div WestRock (1 yr 5 mos)

IT Project Mgr, WestRock (3 yrs 7 mos)

Education

Southern New Hampshire U., BS Marketing

Michigan State U.: EMBA

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The Sales Call

You attended a Gartner Customer Experience & Technologies Summit in Tokyo, Japan February 2019 and met Brent Baker, Deputy Information Officer for Blue Distributors. After pleasantries and getting to know each other a little, Brent suggested you connect with Jay Hilti, the CIO at Blue. It has taken you several months of emails and vm exchanges with Jay's admin to set up this appointment.

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The Sales Call

You attended a Gartner Customer Experience & Technologies Summit in Tokyo, Japan February 2019 and met Brad Anderson, a Network engineer for Blue Distributors. After pleasantries and getting to know each other a little, Brad suggested you connect with Jay Hilti, the CIO at Blue. It has taken you several months of emails and vm exchanges with Jay's admin to set up this appointment.

What you Found

Blue Distributors info from the website

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IT Project Mgr, WestRock (3 yrs 7 mos)

Education

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Michigan State U.: EMBA

Case Info

You have been prospecting organizations over \$500 million in revenue and funding. Heart Hotels, Inc.'s information from Business Insights: Global

2019 Fin. Information

Operating Revenue: \$341 million

Advertising: \$500,000 to \$750,000

Payroll & Benefits: \$500,000 to \$1 million

Technology: \$250,000 to \$500,000

Employees: 750

Founded: 1985

The Sales Call

You cold called Dana Carpenter, the System Integration Specialist at Heart Hotels. You were surprised when Dana actually answered the phone. Dana scheduled this appointment but had to reschedule three times. You never spoke for any length of time, but Dana assured you there was a lot of interest in finding out more about Gartner. You were unable to ascertain the decision maker from your short phone calls.

What you Found

Heart Hotels web site:

Heart Hotels is a privately owned company based in Portland, ME with over 30 year's experience in developing, operating, and managing hotels and restaurants. Heart Hotels currently operates ten hotels with over 2,000 hotel rooms.

Administrative Team from website:

CEO/President: Brianna Heart

Sr. President Hotel Development: Dawn Deeter

COO: Brad Eskridge

VP Corporate Communications: James Peltier

Prospect Background

From LinkedIn: Heart Hotels/Dana Carpenter

15 years of deep technical expertise supporting complex, globally distributed IT environments. Extensive experience with hospitality IT, integrating enterprise level systems and applications using multi-tiered cloud, hybrid and hyper-converged infrastructure.

Previous Work Experience

Heart Hotels:

Manager, Enterprise Systems, 2016-2017

IT Manager, 2014-2016

Hospitality & Retail Systems HRS:

Connectivity & Integrations Analyst 2008-2014

Education

Hillsdale College, BS Computer Science

University of Phoenix, MBA

Semi-Final Round A Salesperson Info

Case Info

You have been with Gartner for a little over a year and have had great success. You identified Fyzical as a potential lead when you went to physical therapy 3 months ago after spraining an ankle while trail biking. Information you originally found on ReferenceUSA:

Sales Volume: \$501 Million

Business Expenditures:

Payroll & Benefits: Over \$10 Million

Telecommunications: Over \$250,000

Advertising: Over \$250,000

Technology: Over \$1 Million

What You Found

FT&B Info from the website: Spelled Differently Because We Are Different - At FYZICAL HEALTH we combine the expertise of medical doctors, physical therapists, and business experts, to provide optimum care for our clients. We have the expertise of over 220 franchises in nearly 40 states - all working to identify the best way to improve the quality of life for our clients.

Dr. Sadeh: FT&B provides a cloud-based resource that provides in-depth training for all franchise positions, a PT testing program app that tests physical improvement and allows patients to do supplementary PT at home, and a cloud-based business & marketing program. They have some glitches. Did not go into detail.

Ms. Parent: FT&B is a great place to work. There are 15 IT support staff that keep up with franchise tech and they are a bit overworked, but like the overtime. FT&B is growing fast and adding a lot of franchises. They are looking for new ways to improve franchisee marketing and their patients' experience.

Administrative Team from website:

Chairman & Co-Founder: George Allen (2012)

Chief Financial Officer: Mark Kubik (2018)

No Others Listed

The Sales Call

You spoke with Farad Sadeh, MD, the owner of Fyzical during your first PT session and found that it is a Fyzical Therapy & Balance Centers (FT&B) franchise. He said that FT&B is the world's fastest growing healthcare franchise and provided you with the contact information of Lora Parent, an IT specialist with whom he had been working. After a phone meeting with Lora she connected you with the Admin. Asst. for Val Steiger, the Director of Strategic Partnerships. Lora said Val had been taking care of IT at FT&B. She also said that Val *probably* made the final decisions regarding IT spend. The information you found from Farad and Lora is provided in "What You Found."

Prospect & Other Information

From LinkedIn: No one had a LinkedIn Profile FT&B is a privately held company.

You are meeting with Val Steiger, Dir. Of Strat. Ptrshps. It took several emails and calls with Caitlyn, Val's admin, to get this appointment. Caitlyn said Val had been with FT&B since 2013 and had been the Digital Marketing Mgr., Marketing Dir. and became the Dir. Of Strategic Partnerships, in 2019. Val is very busy and being pulled in a lot of directions. She thought they were looking for someone to take over the IT area but was not sure. When Caitlyn started with FT&B in 2013, they had 13 locations and last year she thought they had over 300 locations. She enjoys working for the company. She had a mother that had a debilitating illness in 2014 and FT&B really took good care of her mother and helped her have a more enjoyable life.