

NCSC XIV Case Profiles 2022



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Round 1 Salesperson Info

Case Info

You have been on the Gartner team for a little over a year and have been cold-calling with some success but leads from Gartner's Conferences have netted you very good prospects. You have been working leads from last March's CIO Leadership Forum and Eskridge Wine & Spirits is one with which you have had little success in getting a meeting. In August of last year you read *Mark Brown on the Future of Sazerac and the Spirits Industry* in Forbes (July 3, 2021) which spurred you to increase your efforts to connect with Eskridge W & S. Information from your research (2021):

Revenues: \$309.46M

Employees: 1,969

HQ: Atlanta, GA

Facilities: 5 MFG. and distribution facilities in U.S. & France

Recent Acquisitions: Marie Brizard, California Company

The Sales Call

You have been trying to connect with Kris Helling via phone, email, and LinkedIn since August with no success. However, Kris finally accepted your invitation to connect last week and messaged you to set up a meeting through Kris' admin, Brent McCulloch. Kris did not respond to any additional messages, and you have had no communications with Kris, other than the call with Brent. Brent was nice, but you gained no additional information from him, other than him saying that Kris was busy and has had a lot going on over the past 3 months.

What you Found

Founded in 1850, Eskridge Wine & Spirits has thrived as an independent, American family-owned company with operations in the United States and around the world. Since the 2000s, Eskridge has averaged double digit growth every year! Our vision is to become one of the industry's most desired places to be. Eskridge attributes its success to a unique blend of history, culture, brands, relationships, innovation, technology, and most importantly, its people.

Administrative Team from website:

Pres. & CEO: Brad Eskridge

CFO: Duleep Delpechitre

Dir., Digital Experience & Mkt: Kellie Jackson

Dir., Global IT Infrastructure & Ops.: Kris Helling

Prospect Background

From LinkedIn: Kris Helling

Experienced Information Technology Leader skilled in Operations Management, Technical Architecture, Information Security and Information Technology Strategy.

Eskridge Wine & Spirits – 3 years

Dir. Global IT Infra & Ops. (March 2021)

I.T. Operations Mgr (Oct 2019 – 2021)

Kindred Healthcare – 8 years

Corporate Manager – Client Systems (Client Infrastructure, Virtualization, & Software Distribution (4 years)

Sr. Systems Programmer (4 years)

Education: University of Louisville, BS Bus. Administration, Management and Operations

Volunteer Experience

Assistant Coach: Sawyer Youth Soccer Assoc. 2018





Wildcard Round Salesperson Info

Case Info

You have been on the Gartner team for a little over a year and have been cold-calling with some success but leads from Gartner's Conferences have netted you very good prospects. You have been working leads from last March's CIO Leadership Forum and Eskridge Wine & Spirits is one with which you have had little success in getting a meeting. In August of last year you read *Mark Brown on the Future of Sazerac and the Spirits Industry* in Forbes (July 3, 2021) which spurred you to increase your efforts to connect with Eskridge W & S. Information from your research (2021):

Revenues: \$309.46M

Employees: 1,969

HQ: Atlanta, GA

Facilities: 5 Mft. and distribution facilities in U.S. & France

Recent Acquisitions: Marie Brizard, California Company

What you Found

Founded in 1850, Eskridge Wine & Spirits has thrived as an independent, American family-owned company with operations in the United States and around the world. Since the 2000s, Eskridge has averaged double digit growth every year! Our vision is to become one of the industry's most desired places to be. Eskridge attributes its success to a unique blend of history, culture, brands, relationships, innovation, technology, and most importantly, its people.

Administrative Team from website:

Pres. & CEO: Brad Eskridge

CFO: Duleep Delpechitre

Dir., Digital Experience & Mkt: Kellie Jackson

Dir., Global IT Infrastructure & Ops.: Kris Helling

The Sales Call

You have been trying to connect with Kris Helling via phone, email, and LinkedIn since August with no success. However, Kris finally accepted your invitation to connect last week and messaged you to set up a meeting through Kris' admin, Brent McCulloch. Kris did not respond to any additional messages, and you have had no communications with Kris, other than the call with Brent. Brent set up the meeting with Kellie Jackson rather than with Kris who is out of the office this week.

Prospect Background

From LinkedIn: Kellie Jackson

Consumer-centered eCommerce leader & change agent with 14+ years' experience building consumer brands through the art and science of digital marketing.

✓ Successful track record of new business growth within global matrixed environments ranging from minor to major government restrictions and regulation.

✓ Hands-on leader capable of developing website experience, vision, strategy, and roadmap, bolstered by external agency partners to augment a small core team.

✓ Expertise in domestic and international eCommerce.

✓ Adept at building trust-based, respectful cross-functional relationships with vendors and global partners.

Eskridge Wine & Spirits – 2 years

Dir. Digital Experience & Marketing

Reynolds American – 2 years 4 mths

Dir. eCommerce – Consumer Marketing

Sunglass Hut – 2 years

Global eCommerce Solutions Manager, IT Retail

Education: Hillsdale College, BBA Marketing





Quarter-Final Round Salesperson Info

Case Info

You have been an Account Manager on the Gartner team for a little under a year and have been provided numerous inactive accounts. InterTelcom has been in Gartner's archives for 20 years and passed around to other new account managers who have had no success in gaining their business. Information you have:

Annual Rev.: \$650m (no debt)

HQ: Atlanta, GA - Ownership: Private

Employees: 1,350

Last Contact from Gartner Rep: 2005

What you Found

From Sales Navigator

InterTelcom is one of the premier telecommunications solution's providers for businesses across the United States and Canada. With unparalleled North American coverage, InterTelcom is the leading corporate phone service provider to multi-location companies through our scalable solutions, customized to manage all your local, regional and national locations. Through long-term commercial wholesale contracts, InterTelcom offers dial-tone, infrastructure solutions, advanced data services, broadband, and security services to our customers at significant savings. Enjoy on-line location pre-qualification, order entry, order tracking and revenue reporting along with premier account managers.

Co-Founder & President: Karen Peesker

CFO: Lenita Davis

CIO, Sr. VP Info Technology: Shane Dolinski

Dir. Of IT and Infrastructure: Jamie Peltier

The Sales Call

Your Gartner CRM system and reports provides you with multiple "dead" or inactive accounts. InterTelcom has been in your accounts for the past 3 months. The notes and activity indicated that 5 different Acct. Mgrs. over the past 20 years have owned and each made at least 5 attempts (unsuccessful) to gain an appointment with a decision maker. During your weekly research you found Shane Dolinski was recently hired as the Sr. VP of Info Tech. You sent an email to Shane and received a reply almost immediately. Shane directed you to Jamie who set this appointment via email. You have not spoken with anyone personally.

Prospect Background

Jamie Peltier: From LinkedIn (No picture)

Results oriented technical leader with the proven ability to strategically lead Information Technology to meet core business values.

Successfully orchestrated the rapid Covid emergency transition of over 2,000 company-wide users from existing limited remote access to an optimal and fully supported work from home business solution

Experience

InterTelcom: Dir. of IT Infrastructure Jan 2021 – pres.

Starwood Hotels & Resorts: Firewall Manager Sep 2018 – Dec 2021

IntraSystems: Network Engineer Nov 2012 – Aug 2018

US Army: Military Police May 2006 – Oct 2012

Education

Worcester Polytechnic Institute: Client/Server Technology Certificate Program





Semi-Final Round Salesperson Info

Case Info

You are in your first year with Gartner as an Account Mgr. You had a very successful call with Jamie Peltier at InterTelcom. Jamie provided you a referral to F&A Transformational a company with whom InterTelcom has had a long business relationship. Jamie indicated F&A was a growing company and making some big changes in their IT Infrastructure.

Jamie sent an introductory email to Erin Gillespie and copied you.

Annual Rev: \$215.7m
Employees: 1.5K +
Employees in Information Technology: 38 (growth of 52% over past 6 months)
Employees in Sales: 91 (Growth of 435% last 6 months)

What you Found

F&A is a provider of cloud-based solutions that transform Finance and Accounting (F&A) by automating, centralizing and streamlining financial close operations, intercompany accounting processes and other key F&A processes for large and midsize organizations. Designed to complement virtually all ERP and other financial systems F&A increases operational efficiency, real-time visibility, control and compliance to ensure end-to-end financial close management and accounting automation from within a single, unified cloud platform. F&A helps companies modernize accounting operations with intelligent automation, ensuring more accurate and insightful financial statements and a more efficient financial close. F&A helps ensure balance sheet integrity and confidence in their financial statements.

CEO: Greg Rich
CFO: George Allen
CTO: Erin Gillespie
VP Info Tech: Dana Rich

The Sales Call

Erin Gillespie is the Chief Technology officer of F&A. You immediately replied to the introductory email thanking Jamie for the introduction and asked Erin for a date and time for a meeting. A week went by without a response, so you called the number Jamie provided. You connected with Erin's admin, Brent McCulloch, who after explaining your reason for calling, said that Dana Rich, the VP of Information Technology would be a better person to talk to. Brent set the meeting with Dana.

Prospect Background

Your research uncovered the below about Dana on LinkedIn:

Defining and executing strategies that are highly energized, business-focused and meaningful through people, process and technology **
Leveraging my attention to budgets, schedules, vendor relationships, contract management and staffing, I run IT as a business in order to create competitive results and opportunities. I connect people, technology and information in both domestic and global environments.

Experience:

F&A Transformational: VP Info Technology Jun 2021 – present

The WNET Group: Chief Technology Officer Mar 2020 – Jun 2021

National Basketball Association: VP & Head of IT Program Delivery & Business Operations Oct 2016 – Mar 2020

Education:

Vanderbilt University – BS Mathematics & Finance

