NetApp Personas
LEVEL Studios

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NetApp Personas

Change History

Date	Details	Updated By	Notes
10.01.2010	Version 1.0	Monica Tan Melissa Dorcak	• Presented first round of personas • Included key findings and interview highlights
10.05.2010	Version 2.0	Monica Tan Melissa Dorcak	• Revised document based on NetApp feedback • Updated all graphics to show accurate color associations • Page 18 was left as is until further direction
10.15.2010	FINAL	Monica Tan Melissa Dorcak	• Revised document based on NetApp feedback
05.06.2011	Change Request	Matt McClendon Harini Sridharan	• Revised document based on NetApp feedback
05.09.2011	Change Request	Matt McClendon Harini Sridharan Robert Murphy Karen Au	• Revised document based on NetApp feedback • Added CIOs
05.10.2011	Change Request	Matt McClendon Harini Sridharan Robert Murphy Karen Au	• Revised document based on NetApp feedback • Added Alliance Partners
05.17.2011	Change Request	Harini Sridharan	• Revised document based on NetApp feedback • Updated graphs based on NetApp feedback

Chapter 1: Purpose & Method

Purpose

LEVEL was engaged to validate and update NetApp's personas created in 2007/2008 and identify key insights that will ultimately guide editorial strategy.

The goal was to explore IT professionals' research process, specifically looking at what role they play when researching storage and data management solutions, their behavior and digital media habits, where they go, what they look for, and how they use what they've learned.

These personas communicate behaviors, goals, needs, wants, and frustrations. They provide content owners and stakeholders with an understanding of the NetApp.com audience information needs and how best to develop content to meet these needs in order to lead users on a pathway to engagement and sales.

As a follow-on project, LEVEL was asked to do additional research into the behaviors of Technology Alliance Partners when making partnerships decisions.

Further, NetApp requested details about information requirements of the CIO across different-sized organizations.

Method & Evaluation Criteria

Methodology

LEVEL collected data from in-depth interviews, market research, and existing personas to identify common motives and behavior patterns when mapped to the IT research process. All exploration centered on how IT professionals conduct research. LEVEL looked at where the audience goes to find information and, more importantly, why. We also looked at what types of content were most effective and at what point they occurred in the research process.

Defining the Research Process

Market Research outlines three steps in the IT professional's research process: Awareness, Consideration, and Decision. LEVEL has maintained these stages, but also added Recommendation and General Knowledge to tell a more complete story. Below each stage is explained:

1. **Awareness**: The person is learning about what is available to him; he understands the players and what they offer. Oftentimes, he's learning about something for the first time at a higher level. LEVEL found that the more a person already knew, the less time he spent in the Awareness stage.

2. **General Knowledge**: The existing knowledge a person has contributes to how he approaches his research process. At this point, he examines what he has just learned in light of what he already knows.

3. **Consideration**: The person is evaluating, analyzing and synthesizing. The person typically dives deeper into information to start to form an educated opinion.

4. **Recommendation:** The person has a choice in mind and is looking for validation and justification.

5. **Decision**: If the person has the final say, then he is looking to make a decision. If the person does not have the final say, he will think everything through in order to convince the decision maker of his point of view.

In-Depth Interviews

NetApp selected the participants and scheduled one hour interviews.

Participants varied in role, company size, geographic location, and company type. Similar questionnaires were used for all interviews, but slightly modified based on the role of the person.

Once all interviews were conducted, LEVEL analyzed the data to group users by behaviors. Job titles were not considered during this process. This resulted in the following persona types, outlined in detail in this document:

1) Three personas based on their involvement in the buyer's journey and decision making process: Researcher, Decision Maker and Amplifier.
2) Three CIO personas (one for each): small & medium business; mid-market & large enterprise; very large enterprise.
3) Two Alliance Partner personas: one with a researcher role; the other with a decision maker role.

Market Research Analysis

Based on LEVEL research, each person has his own personal style to investigate, consider and make business decisions. However, the analysis pinpointed information sources that are particularly effective at a given stage.

Sources

- Forrester Strategic Oxygen tool
- Forrester: *Size of IT Organization Will Drive Behavior*
- Forrester: *Redesign IT Roles to Drive IT Cost Reduction*
- Topic: *How to Start an Alliance Management Function in your Company, from 6th Annual Alliance Management Congress*
- iPerceptions NetApp Continuous Listening Survey Results
- TechTarget: *New Technologies Getting Attention as Storage Spending Picks UP*
- Forrester: *SMB IT and Non-IT Decision-Makers Are Influenced By Different Parties*
- Forrester: *Role Profile: CIO*
- Forrester: *B2B Digital Marketing: A Deep Dive Into IT Services Decision-Makers*
- Gartner: *Magic Quadrant for Storage Professional and Support Services*
- Forrester: *Best Practices of IT Management Software Vendor Positioning*
- Forrester: *Identifying IT Buyers' Hidden Influencers*
- TechTarget: *TechTarget 2009 Media Consumption Report: Mind set of the IT Pro During the Recession*
- Forrester: *How B2B Technology Buyers Use Social Media*
- TechTarget: *The Google/TechTarget Behavioral Research Project 2; Search Behavior of IT Buyers Online During the Purchase Process*

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Chapter 2: Personas

Persona Overview

Researcher

Jaime

- Maintains servers, storage, and backups.
- Involved in the planning and implementation for storage and data management solutions.

Primary Motive for Research
- Specific need or purpose.

Overview of Research Habits
- Builds a case to present a recommendation to his superior.
- Time spent researching varies depending on the complexity of the project.
- Focused more on specific issues that need to be addressed than general knowledge.
- Wants technical details that help him understand how the solution will work in his environment, solve the issue, and make his life easier when he has to implement it.
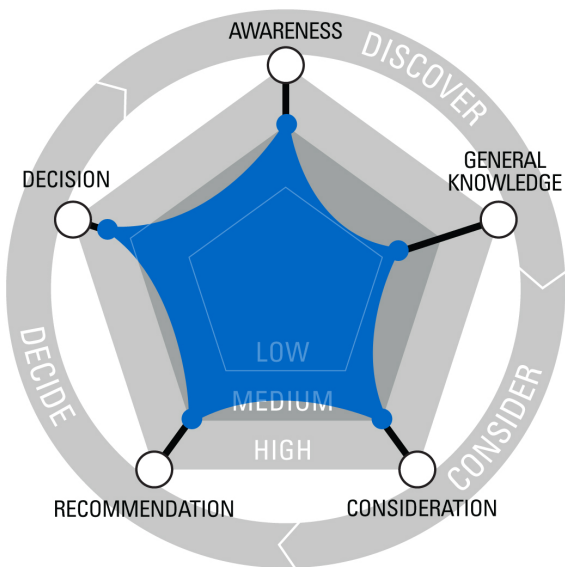
Decision Maker

Neil

- Ensures IT capabilities meet the needs of the business.
- Responsible for the IT infrastructure.
- Makes decisions but sometimes needs financial approval.

Primary Motive for Research
- Decide on a solution that will scale to handle the business' needs not only today, but tomorrow as well.

Overview of Research Habits
- Delegates the research to his team who are charged with making recommendations.
- Makes the final decision.
- Provides high-level guidance to his team.
- Keeps up with industry news and trends.
- Wants specific, data-driven information that explains *how* the solution is flexible, efficient, scalable, and cost-effective.
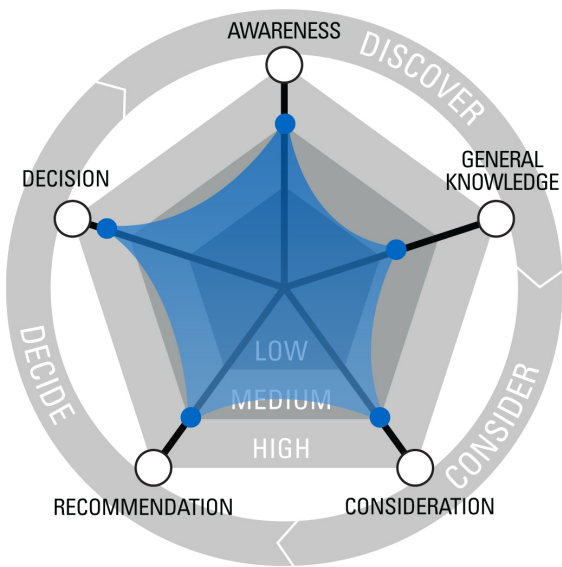
Amplifier

Brandon

- Responsible for designing IT solutions.
- Seen as an industry expert.

Primary Motive for Research
- Increase own awareness and share information with others.

Overview of Research Habits
- Has no specific need; looking to increase his general knowledge.
- Wants to be ahead of the curve when it comes to understanding new technologies.
- Spends a lot of time on forums and online communities to help answer questions and issues.
- Wants to understand how others are interpreting information.
- Asks "Will it be useful to the community and is it worth sharing? Will it help elevate my status as an expert?"
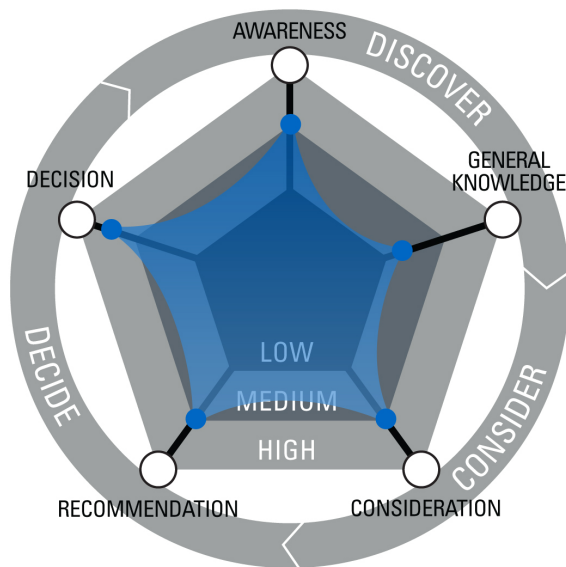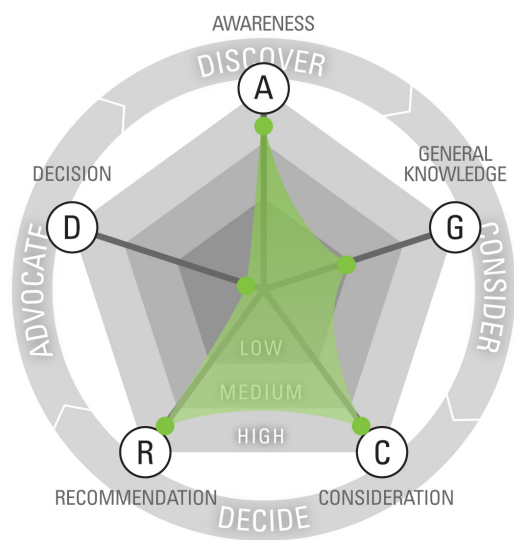
Researcher

Jaime
29-years-old

First-Person Narrative
Each day is different considering the diversity of projects I am working on. Sometimes half a day is spent putting out fires and fixing issues; the other half is planning and researching solutions for my boss. Other days, I'm helping plan larger initiatives like moving our office location or virtualizing the entire company.

Almost everything I do revolves around optimizing our environment. My boss relies on me to make sure we're aware of all the options and their implications. I usually recommend the solution and my boss almost always trusts my opinion.

I rarely have time to keep up with all the trends in my industry. I would like to be more strategic, but there doesn't seem to be enough time to grow those skills. I have a Facebook account, but I don't use it for work. I have a LinkedIn profile that I use to keep in touch with my colleagues.

"I make sure that my superior has what he needs to make the right decision…I'll be implementing it, after all."

Type of Information I'm Looking for
"It's more interesting to see how the product works, see the architecture, etc."
- Case Studies: I am more concerned with a network environment like mine and how the problem translates to my issue than I am with a similar vertical industry.
- Technical Reports / White Papers - Implementation Guides & Best Practices.
- Similar issues on forums and online communities.
- If I don't know what I am looking for, I usually start with a search engine.
- Sometimes I will use the Gartner Magic Quadrant to understand the competitive landscape.
- Videos that look like they are made by techies, just like me.

What I Ignore
- Video case studies that are too well produced and aren't technical enough.
- Documents that are focused on the business problem.
- Marketing materials that do not include quantitative facts.

Key Characteristics
- Wants detailed in-depth technical information.
- Not the final decision maker, but makes the recommendation to his boss, the decision maker.
- Consumes information on forums, but doesn't always have time to participate.
- Creates a spreadsheet comparing solutions that include key features, pros and cons, and pricing.
- Sometimes gets recommendations from experts found on LinkedIn.

Goals
- Keep the company up and running 24/7.
- Become more strategic and less day-to-day.

Frustrations
- The whims of managers who aren't really in the mood to spend money on the things we need.
- Being the technical authority but not having the power to make the decision.
- Justifying good business decisions to people who don't want to make them for political reasons.

Research Habits

Motivations
- Find solutions that work for specific needs.
- Understand the effort involved with installation and deployment.

My Contributions
- Understand in depth how a solution can help solve my issue.
- Conduct and aggregate the research.
- Present my research findings and recommendations to my superiors.
- Place findings in spreadsheets or PowerPoint presentations.
- Once purchased, install and maintain the solution.

Questions I Ask
- Does this solution meet my basic needs?
- How will this solution fit into my current architecture?
- How does NetApp stack up to its competitors?

My Surroundings
Since research is a big part of my role, I use my desktop PC because I need that screen size to read. I use dual screens so that I can see the web while copying and pasting the data into Word or Excel.

I also have multiple windows open at all times so I can monitor my systems.

Decision Maker

Neil
48-years-old

First-Person Narrative

I ensure the infrastructure side of our IT Department is running efficiently and that our capabilities can handle the business's needs. But in reality, I feel like it's my job to be in meetings all day.
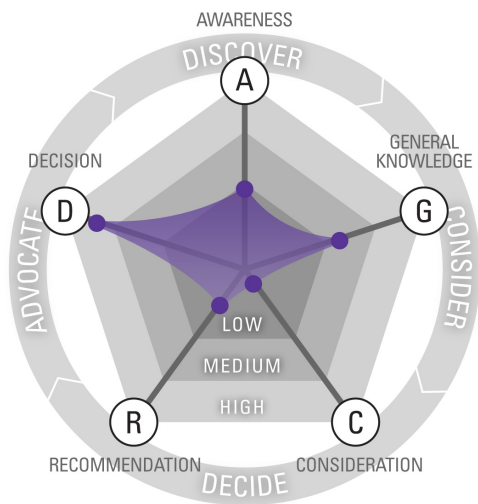
I'm actually late for another meeting right now. We're updating some old servers and my team is presenting their top three recommendations. I already have the idea in mind, but I'm curious to see what they've discovered in the last three months.

My team has over 25 projects at any given time and so it's impossible for me to be involved the way I want to be. So while I can't help manage these projects, I can work to improve their process.

I've been working in this industry for over 20 years now, and there's not a whole lot I don't know at this point. Even still, I think it's important for me to keep up with industry trends, but I prefer for my team to do the heavy lifting when it comes to researching specific solutions.

When I'm home in the evening I like to take a look at a few blogs and see what is popular on TechCrunchIT. I'll also log in to Facebook; I enjoy finding friends from college and it's a good way to keep tabs on my kids.

"I rely on my team for a recommendation so I can determine what it means for the business."

Type of Information I'm Looking for

"I need technical, data-driven facts so that my team and I can properly determine if this solution will work for our needs."

- Quick snippets of information, like a 5-minute demo.
- Credible blogs and news articles that discuss partnerships, who's investing, new trends and technologies.
- Whitepapers that outline decision points and explain the implications of those decisions.
- Short, concise data sheets with diagrams and charts that explain what it does.
- Case studies that detail how a complex issue was solved.

What I Ignore

- Marketing language that doesn't quantify why or how solutions are efficient, flexible, scalable, and cost-effective.
- Emails from people I don't know.
- Anything that isn't factual and analytical.

Key Characteristics

- Decision maker, but needs financial approval.
- Delegates research tasks to his team.
- Focus is on cost, planning, and aligning business units with the appropriate technology.
- Spends about one and a half hours a day researching trends and articles.
- Goes to conferences and does speaking engagements.

Goals

- Connect business and technology.
- Mentor employees to help them achieve their personal goals.
- Empower company's workforce to be more productive.

Frustrations

- Budget constraints.
- The core of the business revolves around information and data, yet IT isn't a financial priority.
- Too many meetings.

Research Habits

Motivations

- Decide on a solution for a specific need.
- Understand exactly how the solution will scale and be flexible for my needs.
- Keep up with industry trends and technologies that will benefit the business.

My Contributions

- Delegate the bulk of the research.
- Receive the recommendation and make the final decision.
- Provide high-level guidance to the team.
- The more it costs, the more my involvement is required.

Questions I Ask

- What is the cost of ownership?
- How will it impact existing infrastructure?
- How difficult is it to maintain?
- How will this solution increase productivity and efficiency?
- Is this solution scalable?

My Surroundings

I wish I did more at work and less at home, but at home I spend time researching relevant trends in technologies on my iPad.

Amplifier

Brandon
35-years-old

First-Person Narrative
I've worked in IT for about 10 years, and 9 times out of 10 I know what's best without having to do a lot of research for a specific solution. While work experience helps, I need to remain active within the IT community to stay on top of industry trends and new technologies.
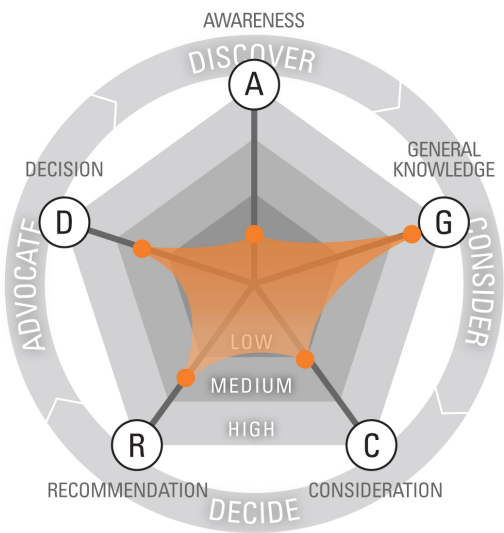
As a result, I spend a good part of my day educating myself on what is going on in my industry and the IT world.

The first thing I do in the morning is fire up my web browser and my social networking feeds to see what's new and what's popular. I've got just over 1,400 followers now and I like to think they rely on me to tell them what is relevant. I know that for myself, the more people talk about a certain product, the larger impact it has on me.

Throughout the day I monitor and contribute to various forums and online communities. When I notice a lot of people are having the same issue, I write about it on my blog.

On my train ride home I'll check my social networks again, and then before bed I'll read in-depth about the topics that I found to be particularly interesting that day.

"I'm the one everyone calls when they have a question, and I wouldn't have it any other way."

Type of Information I'm Looking for
"I like to cross-reference different bits of information to try to glean the insights."

- Technical content from people who have actually experienced it.
- Quick product specs. Technical demos.
- Short, concise headlines that grab my attention on my social networking sites.
- Blogs and industry articles.
- Forums are great because of ability to connect peer-to-peer with technical information, and the lack of marketing lingo.
- Documents that describe how solutions have been implemented.

What I Ignore
- Anything too high-level, like case studies.
- Large RSS feeds that list too many articles.
- Email.

Key Characteristics
- Compelled to share information he learns.
- Ahead of the curve when it comes to industry trends and technologies.

Research Habits

Motivations
- Share knowledge and experiences with other IT professionals.

My Contributions
- Answer questions posted on IT forums.
- Post blog entries.
- Repost interesting articles.
- Educate my peers and colleagues.

Questions I Ask
- How could new technologies be applied to my areas of expertise?
- Does this confirm my existing assumptions?
- How are others interpreting the facts?
- What are all the pros and cons?

My Surroundings
At work, I'm usually focused on solving specific issues, but I do check social networks and online communities throughout the day.

At home, I manage my blog and research new article ideas.

Goals
- Be the smartest person in the room.
- Monitor the cloud movement.
- Leverage technology to allow the company to grow.
- Bring in technologies and solutions to my company to help us perform as well as possible.

Frustrations
- Brand/marketing evangelists.
- Cost getting in the way of implementing the right technologies. Resistance to change.

CIO Persona Overview

VP/CIO Small & Medium Business

Zach

- Oversees IT infrastructure.
- Implementation of Applications.

Overview

- Main goal: Leverages technology to scale as opposed to increasing staffing.
- Involvement in decision making: Assesses the business case; oversees the team who does vendor research; analyzes research; gives final approval.
- Top research/information sources: Network of contacts (to consult with concerning problems, trends and new directions); white papers (prefers ones that are data focused and have a lot of technical specifics); business print/news (for industry examples).
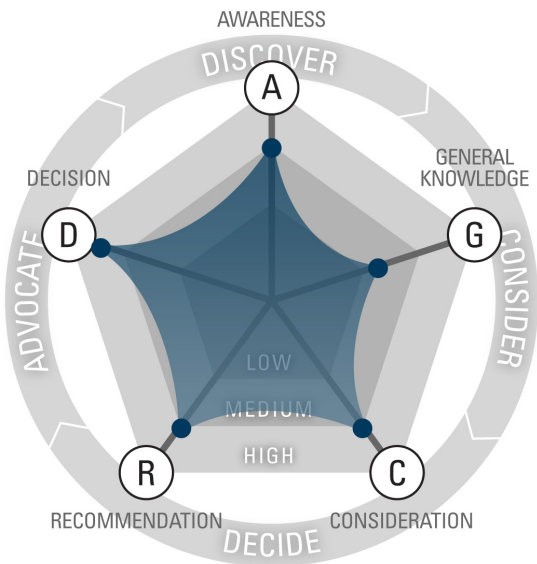
CIO Mid-Market & Large Enterprise

Georgia

- Runs Global IT.

Overview

- Main goal: Invests in new initiatives to drive business.
- Involvement in decision making: Not involved in storage vendor decision; involved in decision making in large IT investments.
- Top research/information sources: Peers, IT professionals, industry analysts. (Least used resource: Vendor sales calls).
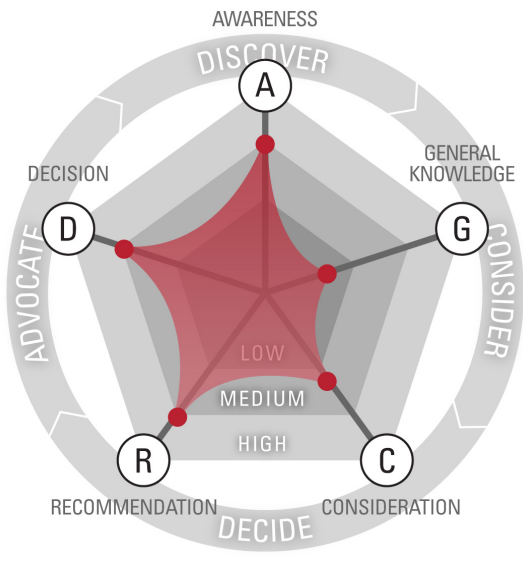
CIO Very Large Enterprise

Lee

- Drives technology strategies.
- Corporate procurement.

Overview

- Main goal: Stabilizes operations and improves service delivery.
- Involvement in decision making: No involvement in individual purchases; involved in the final approval if it is a large IT investment. Sometimes helps vetting technology in larger decisions.
- Top research/information sources: Peers, industry conferences, sponsored seminars, vendor events, Gartner.
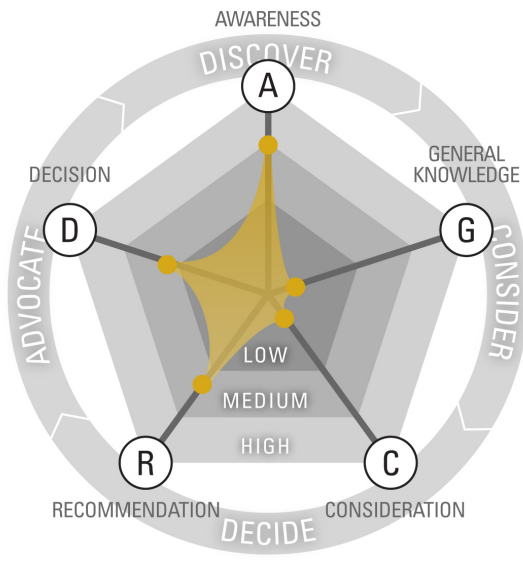
VP/CIO Small & Medium Business

Zach
35-years-old

First-Person Narrative
I oversee all systems, everything related from infrastructure to the implementation of applications. I also work closely with other executives, like the Chief Financial Officer. I am often pulled into conversations related to company operations.

It is important for me to leverage technology to scale as opposed to increasing staffing. I want to take the company a step further by investing in cloud solutions.

I am very data-driven. I am always consciously looking out for the facts in sales and marketing pitches. When talking to a vendor company, I will ask them to bring an engineer with them, along with the sales person. I judge the vendor on their business model and if it is sustainable.

"The economy has had a significant impact. While trying to grow in a market that is having difficulties, we have to be very creative with our purchasing strategy."

IT Investment Decision Process and Involvement
- Assessment of business requirements.
- Make the lease vs. purchase decision.
- Vendor research and narrowing down of vendors.
- Pros and Cons analysis of the vendors.
- CTO has approval power 90% of the time.

### Questions I ask for making an informed IT decision
- What is the business trying to accomplish?
- Will the run rate of the technology allow us to compete with larger organizations, even though only having 50% or lesser staff than they have?

Role/Responsibilities
- Oversees IT infrastructure.
- Implementation of applications.
- Involved in company's operational decision making.

Research Habits
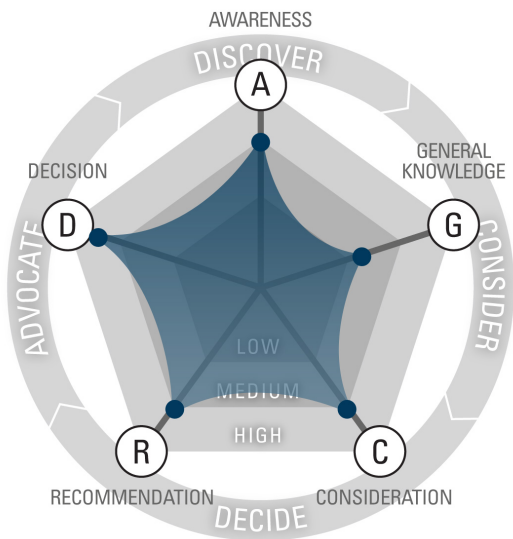
Resources Used
- Business print/news (for industry examples).
- White papers (prefers ones that are data focused and have a lot of technical specifics).
- Direct email (for information about where to buy).
- ROI tools.
- Vendor website (for cloud integration details).
- Vendor sales tele/email.
- VAR (for options available).

Research Habits
- Has deep network contacts to consult with regarding problems, trends and new directions.
- Data and business model are key.
- Uses iPad and iPhone from home and while traveling.
- Minimal use of social media in the Considerations stage.

Vendor Selection

Expectations from a storage solution
- Sustainable business model.

Vendor Selection Criteria
- Wants to understand their business model to ensure sustainability.
- Wants to understand their use of technology.

Goals
- Grow organization to double its size in three years.
- Leverage technology to scale without adding staff.
- Utilize cloud; close data centers.
- Automation of internal processes.

Frustrations
- Resistance to change, introducing new technology.
- Limited resources and staff.
- Limited budget.

CIO Mid-Market & Large Enterprise

Georgia
53-years-old

First-Person Narrative
I run the entire IT organization in my company. I also spend about 20% of my time in marketing. I also do many external speaking engagements.

I am very comfortable with technology. I don't worry about the technology; technology is technology. It is the people and process that are hard.

Storage is something that I consider a necessary evil. Therefore, I look for the highest availability at the cheapest cost.

"I don't personally get involved, that's what my guys need to do. I don't want to care about it. I want my guys to care about it. When it comes to those vendors, I don't really care."

IT Investment Decision Process and Involvement
- Build business case to justify spending.
- Staff helps create roadmap. She is apprised of the roadmaps.

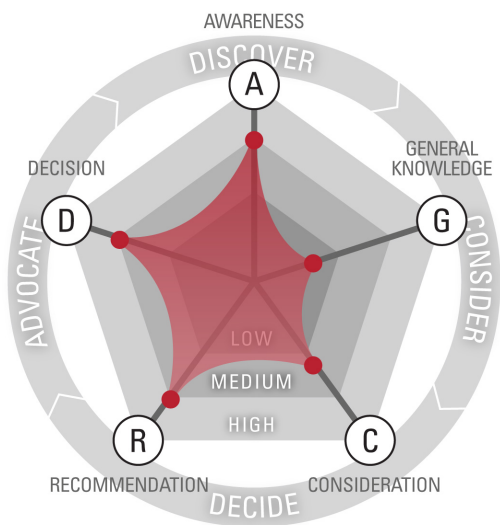### Questions I ask for making an informed IT decision
- Is the technology an industry standard?
- Does it lend itself to high scalability?
- What is the learning curve required to competently manage the installation in-house?
- What is the current vendor's track record?

Role/Responsibilities
- Runs Global IT.

Research Habits

Resources Used
- Gartner.
- Tech print; online tech info (for integration information).
- Tech analysts (for integration information).

Research Habits
- Trusted sources of information: Peers, IT professionals, industry analysts.
- Minimal use of social media.
- Least used resource: Vendor sales calls. (*"I get about 60 calls a day from sales. I don't attend any of them or listen to the voice mails. They have to target the right people."*)

Vendor Selection

Expectations from the IT/storage solution
- Cheaper, faster, better. (*"Lowest level is infrastructure, where storage falls, and to me it's all noise. It has to run cheaper, faster, better, so I can invest more in new initiatives."*)
- Has to fit within the existing architecture.
- Must tie back to core business objectives.

Vendor Selection Criteria
- Will not do business with a start-up, especially for mission-critical applications or infrastructure.
- Industry standards are important.

Goals
- Drive projects and initiatives that support growth and profitability.
- Make everybody successful based on infrastructure provided by IT.
- Maintain uptime.
- Drive innovation. (*"Do whatever you can to maintain uptime, at the cheapest possible rate, so we can invest as much money as we can in new initiatives to drive business."*)

Frustrations
- Dealing with people and processes.
- International work travel.

CIO Very Large Enterprise

Lee
50-years-old

First-Person Narrative

I am well aware of the IT needs and issues and know the responsibility of making the right decision. I leave the researching and laying out of various options to my team. I trust their judgment and have tasked them with the job of doing thorough research.

Of course, I am involved in the final approval, at varying levels depending upon the scale of the IT investment.

"When I'm researching solutions, it would be more effective if they talked about real challenges and how they overcome them."

IT Investment Decision Process and Involvement
- No involvement in individual purchases.
- Wants to understand the value proposition, what's new or unique.
- Helps vetting technology in larger decisions.

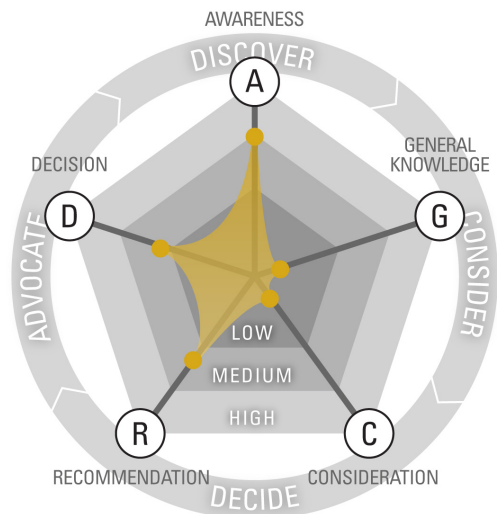**Checklist for making an informed IT decision**
- Confirm Financial Liability.
- Confirm vendor's track record.
- Check experience references (mainly from peers, consultants and Gartner/Forrester research).

Role/Responsibilities
- Drives technology strategies.
- Corporate procurement.

Research Habits

Resources Used
- VAR (for awards and 3rd party recommendations).
- Vendor events (for ROI tools/informational).
- Sponsored seminar (for ROI tools/informational).
- Catalogs (for customer examples).
- Industry conference (for integration information).

Research Habits
- Trusted sources: Referenced from other customers, from those using the product, consultants.
- Mobile use: Blackberry, iPhone (minimal use, due to screen size).
- Least used: Direct mail, blogs, social sites, vendor print, TV/Radio, webinars.

Vendor Selection

Expectations from a storage solution
- Looking for new and different technology.
- Improved efficiency; cost and performance.

Vendor Selection Criteria
- Track record showing consistency in meeting commitments.
- Ongoing evolution of offering.
- Flexible with issues and equipment.
- All around responsiveness and competitiveness.

Goals
- Maintain stable operations.
- Meet delivery commitments.
- Improve costs.
- Improve service delivery.

Frustrations
- Managing partner relationships.
- Cost/budget pressures and constraints.

Alliance Partner Researcher

Raj
36-years-old

First-Person Narrative
I am the Strategic Alliance Manager in the company's Enterprise Network and Virtualization team. I spend 60% of my time helping manage existing partnerships and 40% identifying and helping develop new business partnerships.

When it comes to existing partnerships, I am always looking primarily for technology alignment and integration opportunities between my company and our alliance partners.

With new partnerships, I help identify potential partners and also help in structuring new agreements.

"When our customers look at the end-to-end assets we deliver with our partners, and how well we work together, they know they're going to realize high savings, extreme elasticity and scalability, automated provisioning, a robust IT infrastructure platform. Things will be easier to manage, easier to maintain."

Type of Information I'm Looking For
- Strategic Data: Brand positioning, market segmentation studies, customer value propositions.
- Product Research: Detailed product knowledge and understanding "better together" scenarios with my company's products; new product development; product positioning.
- Social research and corporate reputation analysis.

Responsibilities
- Prepare and help deliver presentations to Executive Management integrating and summarizing scientific, clinical, financial and market information.
- Identify potential partnering opportunities that could help meet our strategic objectives.
- Assist in the structuring and negotiating of licensing agreements with potential business partners (in conjunction with senior members of the team).

Research Habits
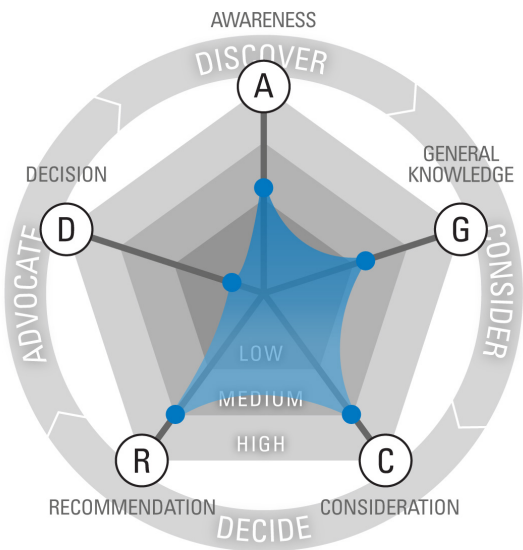
Motivations
- Present detailed analysis to my boss with accurate analysis in revenue and profitability possibilities.

Expectations from Alliance Partner
- Case studies to share with customers about joint solution offerings.
- Portlet for partner-specific resources.
- Timely partner information.
- Discounts on software, hardware, and training for a cost-effective way to get up to speed and stay on top of the latest technologies.

Expectations from Partner Technology
- Flexible and reliable storage platform.
- Supporting IT as a Service / Facilitating cloud-computing architecture.
- Multitenancy.

Goals
- Manage the development of the business case and financial model for new partnerships with other internal functions, as well as manage the overall assessment of the transaction.

Alliance Partner Decision Maker

Hunter
40-years-old

First-Person Narrative
I am the VP of Business Development and Alliances. I manage and execute the Strategic Partner Plan with all our partners in order to maximize new business development. I work with several different internal stakeholders in developing and managing the alliances including the CEO, VP of Sales, the COO, the VP of Product Development, the VP of Human Capital and the VP of Global Accounts.

I also need to look at the partnerships from a sales standpoint. Specifically, I identify the factors which influence sales performance and recommend actions to improve profitability and/or enhance revenue. I am continually developing skills, knowledge and proficiencies in sales.

"From a partnership perspective, we must have a shared vision and an alignment that ranges from the executive levels all the way down to the field and our customers. You'll see the results of this through our R&D schedules, joint development, and even the go-to market activities that we do together."

Basis of Alliance Decision Making
- The first step is always identification of benefits through alliance strategies.
- Identification of potential partners and expected characteristics.
- Risk perception and loss of control perception.

### Factors when Choosing an Alliance Partner
- Diagnosis of the enterprise (similar to SWOT analysis of the enterprise).
- Flexibility of the partner company: Capability to adapt to changing market.
- Knowledge and experience based on prior alliances.

Responsibilities
- Define, develop and execute business development opportunities that will result in substantial market perception and/or revenue.
- Build go-to-market strategies (joint sell, referral, resell relationships) with key partners.
- Continually seek out new partnership opportunities that are in alignment with our strategic growth objectives.

Research Habits
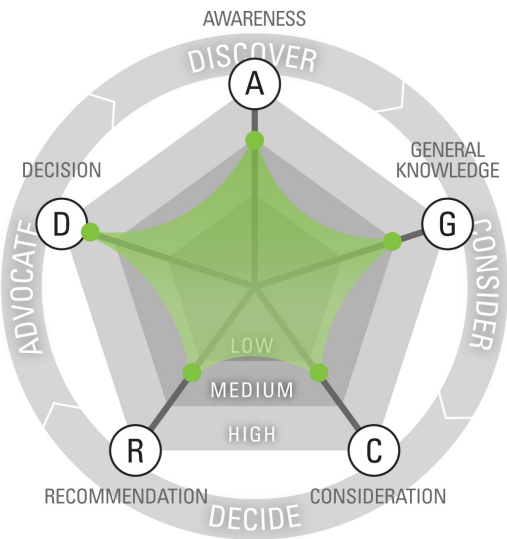
Motivations
- Achieve sales results at or above assigned sales quota.

My Contributions
- Heavily involved in most of the large decision making with respect to partner alliances, especially regarding forming new alliances.
- Filter pertinent knowledge from the research work done by the team.

Expectations from Alliance Partner
- Showcase of my company on the NetApp website.
- Enhanced Technical Support.
- Events and Networking: Sponsor, participate and attend key alliance company events.

Expectations from Partner Technology
- Better utilization of IT assets.
- Flexibility provided by the solution as a whole.
- Integrated technology that works together to provide a cost-effective solution.

Goals
- Focus on new revenue and growth with existing partners.
- Establish effective relationships with C-level executives of partners.
- Develop and execute cross-selling opportunities with partners.

Chapter 3: Appendix

Personas/Job Titles Associations

Researcher			Alliance Partner Researcher
Small & Medium Business	Enterprise and Large Business	Notes	- Alliance Program Manager - Market Research Analyst - Business Development Associate - Corporate Development Strategist - Business Development Consultant - Business and Partner Development Lead - Product Marketing Manager
- Systems Engineer - System Admin - Network Engineer - Technical Consultant / Architect	- Systems Engineer - System Admin - Enterprise Application Architect - Storage Admin - Storage Architect	- Technical consultants are titles that are more common in reseller companies. - In small companies, network engineers also work on storage solutions - Larger companies have more defined and storage-specific roles.	

Decision Maker			Alliance Partner Decision Maker
Small & Medium Business	Enterprise and Large Business	Notes	- COO - VP, Strategic Business Development - VP, Business Development & Partnership Management - Director, Strategic Partnerships - Director of Business Development - Director of Product Marketing - Strategic Partnership Manager - New Business Development Manager
- CIO* - CTO - VP of Operations - IT Manager	- CIO* - CTO - VP of Technology - VP of Business / Enterprise Applications - IT Director / Director of IT Infrastructure - Director of Infrastructure - IT Manager	- *Large companies have both a CTO and a CIO. Small companies usually have only one of the two. - * CIOs are not always involved in the IT investment/purchase decision, especially in the larger companies. There is more hierarchy in larger companies; so lower managers (IT Managers, for example) are many times the decision makers – depending on the cost of the investment. CIOs get involved in the more Large Scale business decisions. See corroborating data below from Forrester Strategic Oxygen and Forrester Research. - In large companies, there are different decision makers based upon whether the IT investment is for buying enterprise applications or hardware. In the former case, the decision maker would most likely be the VP of Enterprise Applications; in the latter, the VP of Technology.	

Amplifier
Could hold any title

Legend:
- Small & Medium Business (< 1000 employees)
- Enterprise and Large Business (> 1000 employees)

Personas/Job Titles Associations Sources

*Data from Forrester Strategic Oxygen tool:

	Indentify Need	Initiate Eval Process	Create RFP	Select Potential Vendors	Contacting Vendors	Formnal Review Process	Testing & Evaluating	Recommend Vendors	Approve Purchase
CIO SMB	35%	30%	24%	29%	30%	29%	23%	23%	47%
CIO Enterprise	31%	28%	20%	28%	18%	30%	22%	20%	44%
CIO Lrg Enterprise	23%	33%	22%	17%	9%	24%	8%	24%	23%

*Data from Forrester Research Paper: *Trends | Size of IT Organization Will Drive Behavior*

"Larger organizations have the highest percentage of decentralized and federated organizations (43%), which results in highly decentralized decision-making."

*Various persona quotes regarding decision makers:

- VP of Enterprise Applications at a large company: *"I make decisions for enterprise applications. My counterpart makes decisions for hardware. It will go to the CIO if we are making a major decision."*

- IT Director at a large company: *"Purchase decisions are normally signed off on at the VP level. For higher levels of spending, it will go to the big boss."*

- Enterprise Application architect at a large company: *"If the purchase decision is for an app we need to use that's related to our business unit, we have the decision-making ability. If it's shared across the mother ship (storage or computer purchases, enterprise apps (Oracle), or service licenses), it will bubble up to corporate. It comes down to: 'the bigger the cost, the more corporate gets involved.' "*

- Technical engineer at a very small company: *"I take my proposals to my boss (which includes the cost-benefit analysis). My boss will take the final decision to CIO; CIO then takes it to finance. Finance department writes the check."*

- Network Engineer at a small-medium company: *"Investments of 10k and less is handled by the IT department. Anything larger is handled by the purchasing department."*

Observations

During the in-depth interviews, several observations were made that are worth noting.

Observation	Learning
Size & budgets matter	- The role of the person and the "hats" that they wear is often dependent upon the size of the company. - The larger a company, the more siloed and structured it is. This means that people tend to have very clearly defined tasks and responsibilities. In smaller companies, the lines between the Researcher and the Decision Maker tend to blur more. - Larger companies also tend to divide decision making power based on the cost of the solution. For smaller purchases, lower managers oftentimes make the call without needing approval from their superiors.
Age may affect research approach	While LEVEL research did not make assumptions or draw conclusions concerning age, it was observed that the younger the person, the more apt they were to trust sources like social media and blogs. Similarly, the older the participant, the more likely they were to have a large network of contacts that was built up over the years.
Everyone ultimately asks, "Will it work for me?"	- Each person in each role is ultimately asking this question, but what they mean by "it" differs. - The Decision Maker is referring to flexibility, efficiency, scalability, and cost savings. He's thinking about the big picture. - The Researcher is speaking about specific features and functionality. He wants to know if the solution will solve the issue and make his life easier when he has to implement it. - The Amplifier is wondering if "it" is useful to the community and worth sharing. He's also wondering if it helps elevate his status as an expert.
The case for social media	- While market research demonstrates that social media outlets like Facebook and Twitter are not used to inform or validate purchase decisions, several of our interview participants revealed why they are valuable tools for increasing awareness and interest. - Everyone complained of having too much email, and no one ever has as much time as they'd like to devote to researching what is important and what they should know. Several participants said that they use social media to help them filter out what's important. - With social media, people can easily determine what is popular in their community. - Also, people tend to trust and put greater value in their chosen network, so the information being fed to them is coming from a source they've opted into. In the case of channels like Twitter, people choose who to follow. In the case of Facebook, they choose who shows up on their news feed. In the case of LinkedIn and other online communities, they choose what groups to belong to.
Mobile device vs. Desktop PC	- Most participants preferred to do major research on a laptop or use a desktop PC with a large monitor. The screen real estate lends itself well to looking at a lot of data at once. - While everyone interviewed has a smart phone, only a few said that they would use it for research. This is likely due to the limited space on a mobile device's screen. However, IT professionals are likely using their mobile device to access Twitter, Facebook, and news feeds. - One participant did mention that he uses his phone to take pictures of slides at tradeshows or seminars. - Another will sometimes bookmark or email himself something he finds on his phone to look at later.
Influenced by past experience	- Nearly all participants mentioned that they prefer to use products and solutions that they have used in the past. At the very least, familiar brands serve as the basis for evaluating other products and solutions. - The most common reasons to remain loyal were proven success, little or no training required, and existing relationships with the vendor.

Thank You.