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S2R Execution Bridge LLC
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"Bridging the Execution Gap from Strategy 2 Results"

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THRIVING IN A HIGH TECH SUPERSTACK WORLD

As the information and communications technology landscape continues to become more tightly integrated around platform superstacks, it is more important than ever for companies to learn how to stay relevant. Five game changers should be top of mind: focusing on competing adeptly in high tech superstack markets, reshaping company culture to address superstack dynamics, improving change management execution, sculpting superstack ecosystems, and transforming Sales Operations to mold the high performance sales team. Being outwardly focused, internally nimble, overall collaborative, and a technology innovator are the four key attributes for mastering how to compete and thrive within a superstack environment.

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Game Changers – 2015 & Beyond

As calendar year 2014 races toward year end close, high tech industry corporate strategy and global sales executives should already be updating their multi-year business plans and thinking about their 2015 initial sales targets. Many are facing uncertain markets amid changing customer buying preferences as traditional hardware and software purchases are moving increasingly toward cloud centric delivery mechanisms. Others are in the vortex of tornado markets¹ and running as fast as they can to keep up. Several are niche players who risk being marginalized by competitors' latest acquisition strategies and disruptive new business models. Some will be facing life as private entities for the first time in a long time. All are looking for game changers for their businesses that will not only drive a successful close to 2014 but will also position them for sustained growth with a dominant market share position over the long term.

Top of mind should be these five game changers:

- 1) **Competing** adeptly in an increasingly **high tech superstack (HTSS)**² **environment**
- 2) **Reshaping company culture** to address HTSS market realities
- 3) Continuously **raising the change management execution bar**

¹ "Crossing the Chasm" Geoffrey A. Moore

² Accenture whitepaper *Competing in a High Tech Industry "Superstack"*

- 4) Sculpting an **ecosystem of channel partners and alliance networks** delivering integrated, end to end solution capabilities
- 5) Cultivating the **strategic and proactive Sales Operations organization** that molds the high performance, consultative, and social savvy sales team

Each one is singularly important. Together they are a tsunami force of focus that not only changes the game but may fundamentally alter the nature of the competition itself. But which one is the most important? Which one should be the priority?

Defining HTSS Markets

Understanding the nature of the game defined by the high tech superstack (HTSS) is a prerequisite skill for the next move on the playing field. What is meant by a high tech superstack and how is it relevant to the ICT marketplace? In 2012, Accenture authored a whitepaper titled *Competing in a High Tech Industry "Superstack"* that highlighted a new era of competition that is centered on more "tightly integrated technology and business ecosystems" than has been traditionally present in high tech markets. Accenture further defined a superstack as a "new view of the competitive and collaborative arena across all the layers of the information and communications technology (ICT) industry."

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The concept of the superstack is an important game changer in that Accenture defined the fundamental shifts in the high tech industry underpinnings³ and amplified the need to address its impact on an organization's overall strategy and Go-To-Market (GTM) philosophy. Competing adeptly in this type of environment is one of the main business goals that high tech senior leaders should incorporate in their long term strategic plans, and is the game changer of choice for the focus of this article. Each of the other game changers will be discussed in more depth in

to deliver impactful results. Peter Drucker is often quoted as saying "Culture eats strategy for breakfast"⁴ and the scattered wreckage of many corporations supports his statement. Culture invariably trumps everything else. If a company's culture is "right" for the challenges it faces, even an average strategy will likely produce results. Culture is the glue that holds the organization together and defines the attitudes, the values, beliefs system, ethics, and work personality of the company. It is the lens that all employees and business partners view their work lives through and

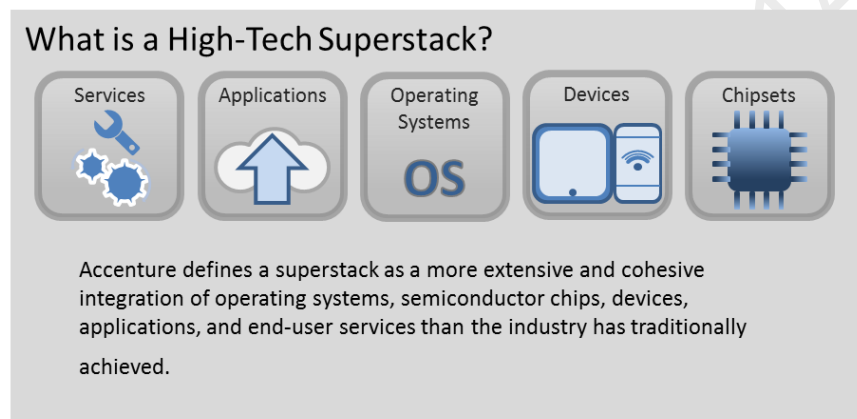


Figure 1: Accenture definition of Superstack³

subsequent papers but are touched on briefly here.

Game Changers Overview

While recognizing the emergence of the HTSS landscape is necessary, it's not sufficient to enable a company to thrive within that environment. Mastering the other game changer elements are needed

crafting a dynamic one suited to the fast paced HTSS world is the ultimate game changer. "Fix culture" and all business deliverables are possible.

Change management follows close on the heels of culture as critical in navigating the HTSS

environment. It is a fundamental attribute that market leaders need to fuel continual growth and sustain their leadership trajectory. Change management in this context refers to how well an organization not only recognizes the need for morphing their business model, solution offerings, and/or processes but also their ability to execute the change crisply while continuing

³ Excerpted from Accenture "Elements of a SUPERSTACK and Key Growth Markets" infographic www.accenture.com/superstack

⁴ Eduardo Braun Huffington Post www.huffingtonpost.com/news/peter-drucker

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to move forward without clinging to old norms and habits that their traditional culture has developed and rewarded. Execution in driving the changes is crucial to moving fast enough to capitalize on opportunities within the HTSS arena.

There is no bigger challenge for an organization to tackle than the change management journey that hurls them toward a different HTSS business model requiring a radical cultural shift. It is like trying to turn the *Titantic* after the iceberg has already been spotted. The power and steering expertise needed to change direction is substantial, and the shipping lane ahead is rife with submerged threats and looming collisions. The more urgent the needed change is for the business, the greater the resistance force is likely to be. Combined culture and change management execution are two of the “not so secret” keys to transforming a firm into a market relevant HTSS competitive force.

HTSS Relevancy Attributes

Market relevancy in today’s environment can be tantalizingly brief. Just ask Blackberry, Blockbuster, or MySpace. The pace of change within high tech markets continues to increase as innovation brings new capabilities and new business models to the forefront. The “connectedness” of the digital world only accelerates the pace of this change with every new offering being almost immediately available for the world to duplicate and leapfrog by simply

tracking top market trends, and deciphering hype cycle buzz⁵. It can be both exhilarating and exhausting at the same time. It rewards those that are not only **technology savvy** but those that are also **continually outwardly focused, internally nimble**, and **overall collaborative**. These four attributes are essential for an organization to not just survive, but to thrive in high tech superstack environments.

Ecosystem Importance

Given the emphasis on more intertwined business ecosystems by HTSS markets, the optimal selection and successful implementation of strategic alliances, business partnerships, and channels to market become critical to an organization’s growth goals and relevancy horizon. Entire value chain systems develop around high tech superstacks and become the “extended family business” for all participants. Within a company’s GTM, the key is to choose the superstack platform of focus carefully. The right choice allows a firm to focus on their core strengths and pick complementary business partners as their stack “friends.” The goal is to choose a stack “family” where everyone can play well together and pursue a common direction of interest on a timeline of mutual choice.

A firm has more ability to influence, and potentially control, other vertical and horizontal layers within their industry superstack based on their perceived overall value within the superstack. The wrong

⁵ Gartner www.gartner.com

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platform choice, however, relegates the firm to the “family” predefined by the platform superstack they have joined with less ability to forge their own road and influence the other players to their advantage. Mastering the development and growth of a healthy, mutually profitable ecosystem of strategic alliances and channel partners within their GTM is the **collaboration game changer** for life in the HTSS fast lane.

Transformational Sales Operations

Even if you have bought into the first four game changers, you may be scratching your head on why Sales Operations qualifies as one. How does something as historically tactically focused as Sales Operations fit into a game changer category? The simple answer is that it doesn't as long as it stays tactically focused. It moves into the game changer realm only by making a conscious move to shed its predominantly operational and tactical bent for a more balanced strategic enablement and sales culture transformation mandate.

Few groups are more important to the health of the Sales team than the Sales Operations team. Ideally, they are the link that aligns the company GTM strategy with effective sales execution to deliver the targeted results. An obvious goal of the Sales Operations team is to simplify life for the Sales team while managing the tools, dashboards, forecasts, quotas, compensation, and overall sales process for maximum productivity. Additional

deliverables are defining the sales philosophy, rules of engagement, customer personas, solution playbooks, coverage map, and the desired salesforce attributes and required competencies for the Sales 2.0 salesforce. But perhaps the most important role of the transformational Sales Operations team is aiding Sales Leadership in reshaping the culture of the sales team. The front line sales teams are the face of the company to its customers, the market, and its superstack network. The degree to which they embrace and execute the GTM strategy, the sales philosophy, the solution mix strategy, and actively demonstrate a collaborative approach to working with their superstack “family” members directly impacts the organization's market position, profitability, and desirability within the superstack environment. Sales Operations must strive to become the transformation arm within the sales function that ensures these concepts take root and come together in all aspects of sales execution.



Figure 2: Five Top Game Changers

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These five concepts are inter-related and their adoption must be worked in concert to deliver game changing results. Taken collectively, they dictate a company's future market relevancy. Over the course of the next few months, we'll look at each one in more depth, starting first with thriving in a HTSS environment.

A Closer Look at High Tech Superstacks

A high tech "superstack" brings to the market a top to bottom offering across "chipsets, devices, operating systems, applications, and services"⁶ delivered through a combination of organic company capabilities, key strategic relationships, and acquisitions. It enables a company to truly craft an end to end solution experience for an end user where it controls its pieces of the stack and often exercises material influence on the remaining stack elements.

Global high tech companies are already implementing different superstack strategies that vary from establishing their own ecosystem, joining an existing one, or consciously choosing to stay focused in their core area of expertise and play across multiple stacks with numerous platform partners. The path they choose dictates where they need to invest resources and capital to enable their stack strategy, and defines what level of cultural collaboration is needed for success.

Organic growth provides the most control but takes longer to deliver the complete solution stack and consumes the most resources while not guaranteeing increased market relevancy.

Inorganic growth still allows direct control of the layer(s) of the stack targeted plus provides access to intellectual property and talent from the acquired company. Market relevancy may also increase faster depending on the acquired company's brand position and the capabilities of the acquired network of partners. But balancing growth expectations and overall returns across the many moving pieces of an "in-house" vertical strategy can be tricky. The reality is that most players pursuing a vertical stack strategy are not able to tackle equally well all five levels of the stack. It is likely that they still require additional strategic alliances to extend coverage across the entire stack and compete more effectively with larger, more vertically integrated competitive stack players.

At the heart of any superstack is the operating system (OS). It is the platform that the superstack is based on; it is the magnet pulling users' interest and access to the applications, services, and devices that define the momentum of the stack. In introducing the description of the HTSS, Accenture used Apple's mobile platform ecosystem strategy as an easy example to understand.

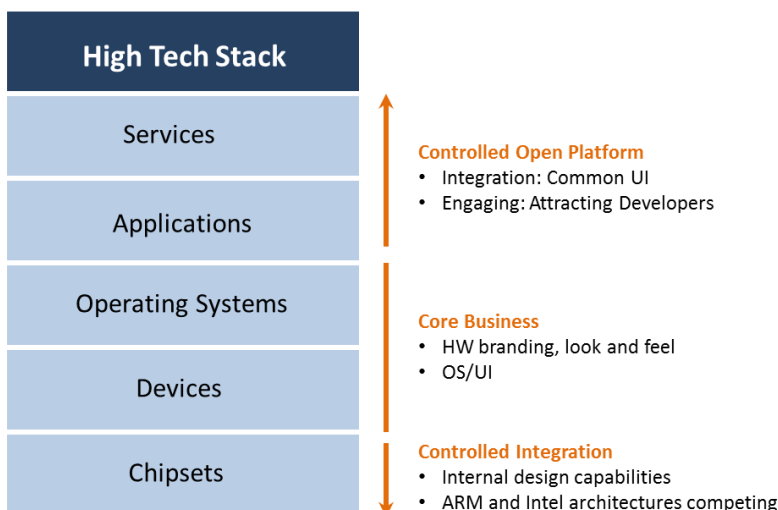
Apple's dominance in their core business of operating systems and devices is leveraged throughout the rest of the superstack where they are able to control integration and materially influence north and south layers of the stack. Other players in the stack ecosystem are compelled to either tightly integrate within the Apple centric stack or compete directly with a different line up of players based on Google's Android platform or attempt to build their own.

⁶ Accenture whitepaper *Competing in a High Tech Industry "Superstack"*

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Figure 3 is taken verbatim from the Accenture whitepaper titled *Competing in a High Tech Industry "Superstack"* to better illustrate the concept.

Figure 3: Apple's integrated ecosystem covering all five levels of the high tech "stack"



Source: Accenture Analysis

A quick comparison in Figure 4 of other notables in the Mobile Platform space shows a variety of existing stack positions and growth strategies.

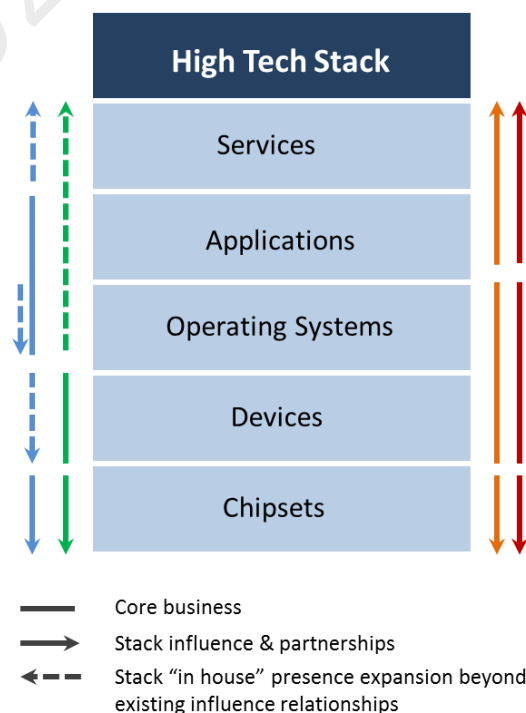
Microsoft has been trying for years to leverage their Enterprise and Consumer OS and applications stack strength to build a Mobile Platform ecosystem. Results have been patchy to date. The dashed arrows indicate their push into Devices and their focus on developing a market competitive Mobile OS. Samsung's efforts to move beyond their Device stack position by developing their own OS, security framework, and applications store have yet to come to full fruition. Doing so may potentially disrupt their leadership position within the Device level of Google's Android centric mobile platform stack. Blackberry illustrates that it is not enough to have control of the Device and

OS levels without material influence across the rest of the stack, **and** being able to quickly recognize and respond to changing stack dynamics when the Enterprise, Mobile, and Consumer markets blur.

Response Strategies

Companies vary in how they are responding to today's superstack environment. Their goal is to carve out their own stronghold within the stack where their value proposition is the most compelling and their market influence the greatest. Accenture defines this as each company's "ideal control point."⁷ Getting this "**where and how to play**" right are two of the most important aspects of competing within a superstack industry.

Figure 4: Strategy Comparison – Apple, Samsung, Microsoft, Blackberry



⁷ Accenture whitepaper *Competing in a High Tech Industry "Superstack"*

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Pursuing either a vertical or horizontal strategy are the two most prevalent paths. Vertical strategies offer complete stacks delivered as total solutions with a large component of the offering originating from the company at the center of the stack. Think of the iTunes and App Store and how Apple has successfully added distribution services on top of their core operating system that fuels the sales of hardware, applications, and software across the stack.

Horizontal strategies tend to be more layer centric where best in class in one key layer or in one key component of a layer attracts strategic partners to build a network that together delivers a more competitive offer than standing alone. The Accenture study found that there was a 60% to 40% split of companies adopting vertical strategies compared to executing a horizontal strategy.⁸

Companies that pursue horizontal strategies tend to join existing ecosystems to focus on being “best in class” within their niche and strive to nurture non-exclusive strategic alliances with like-minded “best in class” companies from other layers of the stack. They may also participate in multiple ecosystems where their expertise is relevant across various superstacks. Vertical stack players, however, tend to coalesce toward one ecosystem in a more exclusionary fashion.

Regardless of which type of superstack path they choose to take, all companies pursuing superstack strategies need to develop four key attributes to ensure success. They need to be **technology savvy, outwardly focused,**

internally nimble, and overall collaborative.



Figure 5: Four Key Organizational Attributes

Each of these attributes impact several key corporate functional areas and core competencies. Participation within superstack environments puts increased emphasis and pressure on the technology R&D teams and Product Management teams to drive product innovation that increases their relevance within the stacks they participate in. It demands that Marketing, Sales, Corporate Strategy, and Business Development teams be plugged in tightly to broader market trends, customer buying personas, and constantly revise their understanding of the dynamics of the stack(s) they participate in and the ones they compete against.

Stack environments are fluid and require a faster pace of change and responsiveness within an organization. Marketing, Sales, Customer Service, Operations, and R&D groups all have to become more adaptable and be able to shift gears quickly based on stack trajectory and any lineup changes of the players within

⁸ Accenture whitepaper *Competing in a High Tech Industry “Superstack*

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their ecosystem. But most of all, every functional area must be skilled at working across internal boundaries and with other external players in the stack to thrive within superstack environments. This is especially true for the Sales and Marketing functions that have responsibility for channel and alliance management.

Technology Savvy

A company often needs to possess coveted intellectual property-based technology assets to establish high tech superstack influence. Their ability to self-innovate, co-develop, acquire, and/or jointly integrate new technology of value into their superstack cements their overall position within the ecosystem. It is not enough for the R&D and product team to address only their core offerings – they also must work closely with the other players' solutions from within their superstack and work toward differentiating integration or unique co-development. Designing their solutions for 3rd party service wrappers and for inclusion in bundled offerings across the superstack is also required. Technology teams need to keep abreast of the latest breakthroughs and be as objective as possible of their own ability to develop new, market moving technologies. They need to especially watch start-ups that enable new business models that may one day displace their core technologies and reduce their relevance.

Creating an incubation team within R&D that specifically is focused on leap frog development versus evolutionary development can be one approach to ensuring the technology team stays innovative. Another approach is through M&A activity that brings an influx of fresh R&D talent

into the mix. Above all else, the “Not Invented Here” philosophy and culture must be stamped out. The goal is to incubate innovation internally, incent technology mavericks, and reward external openness within development and product marketing teams

Outwardly Focused

On par with collaboration, being outwardly focused is a critical determinant of success within superstacks. Companies need to actively seek to recognize the superstack dynamics of the marketplace they operate in today. It is the one time when you are in a race that looking behind you, beside you, below you, and beyond the finish line in every direction **ALL** of the time is required to stay competitive.

Outward focus is not a one time, annual planning exercise. It requires a constant effort and conscious investment of resources to understand the industry dynamics, the broader technology shifts, the ever changing superstack “friend and foe” landscape, and your company’s position within it. It involves a continual scanning of the business horizon to see potential connections and first mover plays that are not readily discernible but will make or break future success.

Most companies do a decent job of looking at the high level market trends and staying abreast of their traditional competitive environment. A basic SWOT analysis will give them an acceptable view of the normal playing field. The danger in relying mainly on this internal view of the outside world is that it tends to be biased and focused on the **existing** market realities. It does not lend itself to identifying market inflection cliffs. The use of the work “cliff” here is intentional as it is not merely an

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inflection point, but instead it's the point where you either jump off the cliff with your eyes truly wide open or stumble blindly over the edge doing the same things you have always done and are surprised by your fall.

It's difficult to remain objective and find the outliers that become market displacers but finding them quickly is important to charting your own superstack path. Being outwardly focused means actively seeking to identify the disruptive innovators and working through worse case scenarios. It means defining what perfect storm could displace you from your market share position and replace you in the superstack. It means putting material time and energy into working with industry analysts, consultants, and market visionary gurus to think through displacement threats to your current business model and strategy beyond just traditional product offerings and delivery models all while searching for the next "big thing." It means adopting a "duck mentality" - if it acts like a duck, and functions like a duck, it can replace a duck and launch a new destructive superstack even if initially it doesn't look like a duck and appears to swim in a totally different pond.

Fostering an outwardly focused organization means creating a "duck hunting one." Did Kodak ever think the first camera smartphones were the beginning of the decline for their consumer camera market? How did Blackberry miscalculate the threat that consumer oriented iPhones would have on their enterprise business? Why have traditional software giants been slow to respond to cloud centric competitors? How will Cisco, Juniper, and other networking giants address the impact of software defined networking? (SDN)

The answer is that it is extremely hard to see the forest for the trees when you are inside the belly of the beast which is why offsetting the internal bent is crucial to competing in a HTSS world. Even the smartest, most passionate people can miss key trends when they are focused too much on the current landscape. An organization has to systematically fight the natural tendency to filter market input through their internal blinders of today's environment and market threats. The "duck hunting" organization can not only identify potential disruptive displacers but also actively contemplates war game scenarios to hedge their bets on the future direction of their business. They compliment their duck hunting efforts with *World War Z* tenth man type scenario mapping.

In the zombie apocalypse movie *World War Z* (WWZ⁹), Israel is portrayed as implementing a tenth man approach to all threats. The tenth man framework basically says that if nine people agree on the response to a threat assessment, then the tenth man must take a contrary position and craft alternatives that the rest of the group must actively consider and develop a counter response implementation plan against. The intent is to reduce the influence of group thinking and to ensure that outside ideas and options are being introduced into the decision set not matter how far-fetched they may seem. Whether or not Israel actually employs this strategy is not relevant, what is relevant is that the approach can go a long way in helping organizations develop an outward focus that defines a HTSS market leader.

⁹ *World War Z* - 2013 motion picture inspired by Max Brooks "World War Z: An Oral History of the Zombie War"

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Once they have identified disruptive displacers, a cross discipline group of resources actively plays out potential market shifting moves and assesses the risk to the organization's long term strategy. They make an effort to walk in the shoes of the displacers and anticipate what they would do if they were in the displacer's position. What would their likely game plan be against your company or your superstack? How would the customer base respond? Would any potential displacer be the catalyst to create a new business model and superstack or would they target a reshuffling of players within existing ones? How likely is it that one of your stack partners makes the move from "friend" to "foe?" How would you respond or defend? To counter or pre-empt their likely actions, what type of extended partner network do you need? How deep are your organic assets and company skill sets today? Are they the same assets and skill sets that are required to realize your market vision of the next three to five years when taking into account visible displacers and shifting business models?

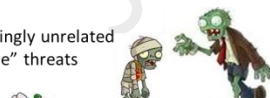
Usually the providence of the Corporate Strategy group, the Business Development team, and the CTO office, looking far beyond the current horizon must become a skill that is adopted by the entire organization. The "what-if-scenarios" and war game mindset are integral parts of developing the outward focus needed to win. At a minimum, Marketing must incorporate the superstack as a whole directly into their GTM strategy ecosystem framework. Sales and Sales Operations must rethink how the superstack ecosystem impacts the sales execution plans and partner philosophy plus actively collect and report the clues in the current marketplace that help identify displacement ducks and future zombie attacks.

Internally Nimble

Traditional command and control, functionally siloed organizations have a tough time making the broader market assessments objectively, and an even harder time aligning themselves to move fast enough to address new threats. They are often entrenched in their structure, their culture, their processes, and their current understanding of the industry landscape they participate within. They frequently work to optimize their own piece of the organization oblivious to the potential negative impact of their actions on the performance of the overall organization. They struggle to adapt quickly to new threats and market shifts that require new skills and industry alliances to succeed. Firms need to become more agile and malleable to remain competitively in high tech superstack environments.

Flattening and streamlining their organizational structure and processes helps companies start the move toward becoming a

Considering seemingly unrelated markets & "zombie" threats



Recognizing adjacent markets & emerging threats

Focus on existing markets & familiar threats

Figure 6: Outwardly focused HTSS horizon

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more agile, execution focused entity. But unless those changes are accompanied by more open lines of communication up, down, and across functional units, it is not sufficient for transforming them into a nimble competitor. They need to foster and reward a “straight talk” environment where issues, ideas, and information are welcomed from all parts of the organization and from all levels. Reshaping their business units to work closely together as end to end owners of the solutions tailored to end user segments is an important first step to ensuring the entire organization keeps abreast of the market pulse and is able to realign and refocus the collective organization within HTSS environments. The combination of all of these adjustments is fundamentally the cultural transformation that is identified as a standalone game changer and is covered in more depth in a separate whitepaper.

Overall Collaborative

The very definition of a high tech superstack highlights the increasing need of a firm to work together more closely with a network of external entities to deliver an integrated stack solution and GTM coverage strategy.

Collaboration, both internally and externally, is one of the fundamental capabilities that a company must develop to succeed and lead within superstack ecosystems. It is much more than just enabling work flows and dialog through technology tools. It is a business style and personality that is focused on creating a larger pie for all participants in the network to share. It is a belief system that by working more effectively with others, you not only are working smarter but are enabling a stronger market offering by pooling resources, knowledge, and capabilities by sharing mutual

strengths. Developing the internal culture of collaboration is part of becoming a more nimble organization via a conscious effort to shape an organization’s culture. Internal success is a harbinger to external collaboration success. If an organization cannot cross internal siloes to focus their own efforts, how successful can they be in reaching out externally and working through the added challenges of working in concert with third party teams within their superstack?

External collaboration requires the ability to form strategic alliances and build channels to markets to create a healthy and relevant superstack ecosystem. Success in this area allows companies to expand their customer base into new geographies, new industry verticals, and new markets altogether. It allows them to gain access to industry talent, intellectual property, and new routes to market that they would otherwise not have access to or would take an inordinate amount of time and capital to secure standalone. It can enable them to expand their solution portfolios into new services areas and/or fill a gap in a missing layer in the stack.

Mastering the ability to collaborate externally enables a firm to grow market share rapidly across all hardware, software, solutions and service aspects of the stack and enables them to adopt new business models faster. Sculpting an ecosystem of channel partners and alliance networks to deliver integrated, end to end solution capabilities is another standalone game changer that is discussed in more depth in a separate whitepaper.

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The HTSS Horizon – 2015 and Beyond

Looking ahead, the HTSS environment is continuing to redefine itself amid introduction of new market entrants, constant repositioning of players' spots in the stack, and the dismantling of old stacks in favor of more "shiny" new ones. It may also be facing increased activist shareholder headwinds as investors and executive management teams struggle with the trade-offs a long term, vertical end to end solution stack strategy entails compared to a less wieldy horizontal strategy or focused niche play. It will be interesting to watch how those pressures and the different strategies taken to address them plays out with Oracle, HP, IBM, and EMC to name just a few. Dell's journey from public to private will continue to be an intriguing one to watch in comparison to their public counterparts. Does going private provide the long term breathing room needed and deliver an edge to pull off the transformations required to thrive in a HTSS marketplace?

Regardless of whether they pursue a vertical, horizontal, or niche HTSS strategy, stay public or go private, the future market leaders in the high tech industry superstack environments are those companies that can identify and execute their chosen stack strategy by maintaining an outward focus, developing a culture of collaboration, creating technology leadership and innovation within their ecosystem, and being internally nimble enough to master the changes needed to stay competitive.



Figure 7: Foundation of success in HTSS markets

About the Author

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