STRATACORE

WHITE PAPER

Why You Need a Technology Advisor

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The IT Executive's Dilemma

The world is going digital at a dizzying pace. When we once drove to the bank to deposit checks, we now merely open our phones and go to our banking app. While in the past running 18 million simulations took months, simulations at scale can now be done in hours or minutes. The way we interact, transact, and go about our daily lives is changing—and our expectations have evolved. Companies must transform and embrace new technologies to stay relevant, secure, and competitive.

Technology, to drive business outcomes, is a focal point for executive scrutiny and prioritization. According to [Gartner's 2022 Worldwide Forecast for IT investment](#), CIOs are accelerating IT investments as they recognize the importance of agility in responding to disruption caused by geopolitical issues, pandemics, inflation, new competitors, and supply chain challenges.

In this context, CIOs are now turning their attention and investing in areas such as analytics, advanced cloud services, cyber security, and using artificial intelligence to improve the customer experience.

What Keeps an IT Executive Up at Night?

The role of the IT executive, such as the Chief Information Officer (CIO), is evolving. According to [Gartner's Top 3 Strategic Priorities for CIOs in 2022](#), there are three actions that IT leaders should focus on as the world recovers from COVID-19: 1) Utilize business composability to more easily address competing imperatives; 2) Capitalize on force multipliers to advance digital dexterity and close the talent and skills gap; 3) Focus on a Human-Centric Design for the Workplace.

In today's world, even the most seasoned, competent, and motivated IT executives can find themselves overstretched: Driving business strategy with other line-of-business owners while still managing, maintaining, and evolving the IT footprint to meet the day-to-day needs of the business.

In addition to their traditional responsibilities, such as IT vendor research and sourcing, today's IT executive must:

- Maintain an effective security and compliance posture within an increasingly interconnected (and vulnerable) digital landscape

- Understand how emerging technologies – such as AI / ML, voice recognition, and the Internet of Things (IoT) – are changing the way consumers interact and conduct transactions

- Prioritize agile development methods and lead a DevOps transformation within the company

- Hire and retain top technical talent and train existing employees on new technologies

- Conclusively demonstrate the business benefits and outcomes of technology decisions

- Coordinate and engage with key stakeholders across all areas of the business, both internal and external, as they all must embrace technology solutions to be successful

- Understand and help lead the culture change an organization must undergo when implementing a digital transformation agenda

- Adopt a human-centered philosophy both for the Employee Experience (EX) and the Customer Experience (CX)

Are you suddenly feeling like the room's temperature has risen and aren't sure why your palms are sweaty? Your ever-expanding list of priorities needn't be overwhelming; in fact, the evolving nature of your role offers you a unique opportunity.

As an IT executive, you're positioned to positively impact your team and your business by focusing your time on priorities – like those listed – that most demand your unique expertise and skills. But to dedicate the time you need, it's important to draw the line at where you feel your time is best spent and remove some of the heavy lifting from your plate, such as IT vendor sourcing, negotiations, and procurement.

Technology Advisors exist to make your life easier by being your dedicated expert and advocate in the IT services space.

Your Secret Weapon: The Technology Advisor

Imagine you're a professional athlete: You have innumerable skills differentiating you in your sport, and your days fly by as you juggle workouts, games, the playoffs, and your personal life. You also need to ensure you're being fairly compensated and recognized. You can hammer a baseball 450 feet, but contract negotiations, simply put, are not one of your core competencies. That's why you have a sports agent: To provide you with specific expertise and support as you traverse the complex world of sponsorships, endorsements, appearances, and contracts. An agent liberates you by saving you time, making you money, and providing expertise so that you can focus your efforts on what differentiates you – your ability to perform as a professional athlete.

As an IT executive, you're the consummate technology professional and expert in your company – and you deserve to focus your time on what you do best: Using data and technology to help drive new business opportunities and evolving your team. Though critical to your success and the success of the company, your time is not best spent navigating the IT services provider marketplace, negotiating contract terms with different providers, and keeping pace with pricing trends. In fact, because it's not a core competency, you may end up negotiating sub-par contract terms for an IT service, leaving you stuck. Or even worse, picking the wrong supplier due to limited information.

Note: *In this white paper, the terms Technology Advisor and IT Broker are used interchangeably. In reality, they can have different meanings. A technology advisor could work solely as a consultant and not broker services. Likewise, an IT Broker could just transact*

services without providing advisory services. For this whitepaper, we use these terms as one to encompass the full benefits of both working together.

How can a Technology Advisor make your life easier?

Technology Advisors live and breathe the IT services marketplace. The market is evolving at a breakneck pace, particularly with the growth of cloud-based solutions. It's a broker's job to stay up to date on industry trends, pricing, providers, and services – so that you don't have to. And because IT brokers are paid a small residual commission from the service providers they engage with, you don't write a check for an IT broker's services.

A quality firm has broad expertise: StrataCore, for example, is the largest firm in the Pacific Northwest and has a deep bench of professionals with decades of experience. It's their job to help you identify the right technology options for your company's needs: evaluate and help you understand the unique differences between suppliers. And why those differences matter. For example, they can help you analyze specific security solutions to gain a better security posture, such as Intrusion Detection and Prevention Systems (IDPS), alert management, and security information and event management (SIEM) providers. All with the goal of finding you the best cyber security provider for your specific need.

The mission of a top-notch Technology Advisor is to:

- **Keep you informed on next-generation technologies.** We're in the midst of a technical revolution, and digital information is at the center of it. Businesses are moving from asking "what happened?" to predicting what's coming, solving problems before they start,

and using data to unlock opportunities. As artificial intelligence (AI) and machine learning turn from sci-fi promise to everyday realities, clients need to see what's coming before it happens. For example, next-generation contact centers are cloud-based, and many platforms use artificial intelligence to improve the customer experience. Using natural language processing, AI evaluates customer tone, agent tone and resolution effectiveness. AI can also assess and provide feedback via numerous client channels to provide instant agent coaching or respond to customers automatically.

- **Save you time.** By engaging with a broker, you get an industry expert to help you sort out the best options, get the right protections, and at the right price. A good Advisor will keep you up to date on trends in the marketplace and provide detailed side-by-side technical and pricing analysis of the top options to help you make smart decisions.

- **Advocate on your behalf.** A Technology Advisor is an extension of your team: If you win, they win. Their goal is not only to save you time but to make sure your best interests are being represented when discussing contract terms, pricing, and options with providers. Armed with in-depth knowledge about competitor pricing and industry trends, a good broker won't back down until they know you're getting the optimum outcome. And when issues arise after contracts have been signed your Advisor will be there to advocate fiercely on your behalf. They do this because they want to keep you happy as a long-term client.

- **Strategize with you, in both the short- and long-term**. Technology Advisors start by diving deep with you and key stakeholders to understand your current state, then roadmap you to your ideal state. They provide individualized guidance and share best practices across the entire lifecycle of your technology, until you retire it, and then onto the next generation.

- **Introduce you to an extensive network of IT service providers.** It's an IT broker's job to maintain strong relationships with IT service providers across industries, and continuously cultivate new relationships with providers they believe can drive value for their clients. StrataCore, for example, works with over 400 IT service providers across the globe. This makes it easy for clients to quickly become familiar with the different offerings within the space they're focused on. Need to find the best CCaaS provider for your specific needs? A good technology Advisor will instinctively know the best three to talk to for your situation. Same with finding the best cyber security suppliers, best SD-WAN vendors, and best data center providers.

- **Vet the IT services market for you to identify solutions fitting your needs.** Instead of evaluating 16 different service providers who may or may not meet your needs, an IT broker will conduct a thorough analysis of available providers, present you with side-by-side comparisons, and help you narrow down the list of viable solutions. Since it's all they do, all day, every day, they can quickly traverse the process and help you avoid common pitfalls. A good Technology Advisor knows the best cyber engineers, the best cloud architects, and the best digital infrastructure architects. Introductions to key technical experts and niche suppliers is a valuable benefit of working with an experienced Technology Advisor.

- **Benefit from years of market analysis.** Tracking providers, services, and trends are at the heart of what Technology Advisors do. You benefit from the tribal knowledge of the broker. Wayson Vannatta, CIO at WatchGuard, explained that StrataCore's expertise is crucial to his procurement of new IT services: *"When it comes to getting IT services, the first partner I call is StrataCore. I count on them to know the heartbeat of the market and the best options for our business needs."*

- **Unbiased and biased provider recommendations.** A good IT broker offers objective feedback, suggestions, and information about your different options. Brokers won't shy away from giving you pros and cons for each provider and have no incentive to recommend one provider over another. For example, if a provider is struggling to keep other clients happy then a good broker will let you know that. They also make it easy to compare and contrast different options. StrataCore, for instance, turns complex 20-page IT service provider proposals into easy-to-digest side-by-side comparisons. The company also shares with its clients a vendor selection matrix, and a weighted ranking based on an objective analysis of a client's needs. This helps provide clarity on which provider may be best suited to meet your specific business needs.

- **Save you money.** Brokers keep a strong pulse on the IT services marketplace, closely track pricing trends, and stay current on best practices. By working with numerous providers, they're able to monitor pricing benchmarks and forecast future pricing trends. This maximizes their ability to help you save a substantial amount on your IT services bill compared to what you may be able to negotiate on your own. For example, with the implementation of a comprehensive unified communications as a service (UCaaS) solution, StrataCore helped World Vision save 40 percent on overall voice-related costs or $800,000 over the initial term of the contract.

Working with an effective IT broker will leave you with more time on your hands, more money to devote to other initiatives, better negotiated IT service contract terms, and an improved IT footprint. An IT broker should bring you peace of mind — but it's essential first to properly vet a broker to ensure they're the right fit for you.

How do Technology Advisors Get Paid?

Much like an insurance broker, Technology Advisors earn commissions from the suppliers. Almost all businesses buy their insurance via a broker because they want an industry expert to guide them through the process. Same for Technology Advisors. Occasionally, if it's a very custom project or requires ongoing project management, then there is an upfront or retainer fee; however, that is not the norm.

It's important to understand that Technology Advisors may have a love/hate relationship with many of the suppliers. Suppliers love Advisors because they don't need to pay a base salary, upfront commissions, employment taxes, benefits, etc. In comparison, suppliers only pay Advisors when they make a match.

But suppliers also dislike Advisors; and for reasons clients appreciate. Providers dislike Advisors for four main reasons:

1. Advisors represent all the competition
2. Advisors run a reverse auction
3. Advisors help clients redline unfavorable terms in the supplier service agreements
4. Advisors (in some cases) replace the direct sales rep or cut their commissions in half

So it's important to anticipate channel conflict, and if you choose to work with an Advisor, then they will need your support.

Not All Brokers Are Created Equal: How do you Pick the Best Technology Advisor?

What you look for in an IT broker is akin to what you look for in a long-term business partner or key employee: Intelligence, expertise, loyalty, and proven success. When beginning to engage with an IT broker, start with the following questions:

Why is an IT broker in the business of providing these services? What do they believe is unique about their IT broker model?

Learning why a broker believes in the model can provide you with deep insight into the company's methods, standards, and overall enthusiasm. StrataCore's founder and CEO, Aaron Loehr, established the company after spending years working for different IT service providers and witnessing similar clients pay wildly different amounts for the same services. Clients also had huge differences in their legal contract terms and SLAs. These gaps were a consequence of varying levels of a client's insight, time, and negotiating prowess. Loehr felt that clients deserved better: *"I believe there is a superior way for companies to gain market insights and procure IT services,"* says Loehr. *"I started StrataCore to help companies gain equal footing, better pricing, and better contract terms by providing an alternative to the old models."*

More Questions to Ask:

**How much experience does
your team have?
Can you quantify that experience?**

The more time an IT broker's team has in the industry, the more knowledge they acquire and that can be put to good use on your behalf. For example, StrataCore's team has brokered more than 4,000 contracts for enterprise clients. There's a big difference between working with small customers versus large multinational organizations. It's vital to learn upfront how much relevant experience a broker can bring to your projects.

**Do you have a proven process?
Tell me about your approach to solving complex problems.
Tell me about your clients' successes.**

One of a broker's main differentiators is their proven ability to guide you through complex technical designs and negotiations, across global locations that require the utmost in performance and perfect uptime. Ask a broker to give you 5 examples of situations where they've helped a client transform their legacy infrastructure to next-generation services while maintaining uptime and satisfied stakeholders. Or have them share stories where they opened a bad agreement, mid-contract, and successfully renegotiated unfavorable contract terms and bad pricing. Ask them about their most difficult projects, and then ask to talk to those clients.

**Who are your other clients?
Can you provide me with references?**

Hearing a testimonial straight from an existing client is the best way for you to gain an objective perspective of a broker's capabilities. First, check out a broker's website to see if they have any existing testimonials or case studies you can download. And make sure the references include full name, title, and company. Before you begin to engage with a broker, ask for 3 – 5 client references that fit your use case and objectives.

Here are a few examples of testimonials from StrataCore's website:

"The STRATACORE team has helped immensely over the years. I don't have to augment my team with experts – you fulfill that role."
Brian Hanson | Senior Director, Comcast

"If you want someone who understands the marketplace and that is going to work with honesty and integrity, I recommend working with STRATACORE."
Randy Boyd | Infrastructure Architect, World Vision

"It's easy to stand out when things go smoothly, however it's when things don't go as expected that you want STRATACORE in your corner."
Jai Dalal | VP Internal IT, WideOrbit

"I've worked with other IT services brokers over the years, and none of them match the level of service and technical competence as StrataCore – that's why I keep coming back to StrataCore."
Paul Farrall | Chief Information Security Officer, Skytap

How do you differentiate yourself from other IT brokers?
What have you accomplished?

Ask a broker if they've been formally recognized by any of their clients, providers, or business publications. For instance, StrataCore's team has earned dozens of awards from providers for being a top Advisor. This is important to clients because formal recognition means an Advisor has executive-level supplier relationships that can be leveraged when needed.

StrataCore has also won numerous great place-to-work awards from publications such as Fortune Magazine, Seattle Business Magazine, and the Puget Sound Business Journal. This matters because happy employees go the extra mile for clients.

What do you value in the relationships you build with clients?

After meeting with a broker and doing some additional research, ask yourself: Is this company one I can see myself working with long-term? Do we seem to click? Do I trust them? It's crucial you feel comfortable with an IT broker and their firm, as they'll become a trusted advisor to you and advocate working on your behalf. Dig for specific examples of strong client relationships they've built that have gotten stronger over time. And remember, it's okay to go with your gut. If you don't feel you can work with the broker long-term, then walk away.

Don't Go At It Alone - Take Advantage of an IT Broker's Core Competencies to Better Focus on Your Own

Turn the IT executive's dilemma on its head and partner with a Technology Advisor like StrataCore; then you can focus your efforts on what will drive your company's success, innovation, and growth. Are you ready to maximize your time and gain new insights into the complex world of IT services? Reach out to StrataCore today to engage with an expert team of Technology Advisors.

About StrataCore

StrataCore works as a Technology Advisor to help our customers understand all the options that exist in the technology marketplace: how they're similar, and different, and why those differences matter.

We help our clients see around the corner and ensure they follow best practices for their digital infrastructure.

Next-Level Advocacy
You need a fighter by your side throughout the entire lifecycle of your connectivity, cloud, data center, CX and security technologies. We are not a reseller. We are not a supplier. You need a guide and advisor to ensure you get the best overall experience.

We Augment Your Team
Maintaining old technologies creates risk. Technology change also creates risk. It's critical that projects are designed and

implemented correctly the first time. StrataCore maximizes your chances for outstanding results.

Why StrataCore

There are many pitfalls to navigate when managing technology change. You need a partner that has deep experience with the technology providers.

- Agnostic Guidance
- Custom Tools
- Proven Process

StrataCore Champions Our Customers

We are the largest agency in the Pacific Northwest, and we employ a team of expert individuals. Our team members are enthusiastic and passionate about their work. We consistently win Top Service awards as a result of our comprehensive support, generous availability, investment in our customer relationships, and, of course— your outstanding results.

Our Culture Elevates Your Experience
Shared Values Create Value

Our team subscribes to a set of core values that establishes our priorities and commitments.

1. Be Exceptional
2. Solve Problems
3. Team First
4. Advocate Fiercely
5. Deliver Results

Provider Awards

Anexio - Partner of the Year

Call Tower - Top Revenue, PNW

China Mobile - Top Producing Partner

Cogent - Top Producing Agent

Coresite - Top Revenue Producer

CyrusOne - Top Billing Master Agent

Digital Realty - Top Partner, PNW

DRT/Telx - Gold Partner, Top Agent PNW

EBCR - Top Agency in the USA

Equinix - Top Revenue Agent

GTT - Top Agent, NW

INAP - Top Partner, NW

Interxion - #1 Agency, NW

Mammoth Networks - Premier Partner, NW

Masergy - Top Performing Sales Partner NW

NTT Communications – Top Producer

Orlon VM - Top Cloud Broker, NW

PCCW - Top Agent, PNW

QTS - Top Partner, PNW

RingCentral - RingExcellence Award

SIM - Key Partner

Telia Company - Top Agent, PNW

Telstra - Top Deal

Unitas Global - Top Agent, PNW

Unitas Global - Most Innovative Cloud Solution

Wave - Highest Revenue Partner

Wowrack - #1 Channel Partner

Zayo - Top Agent, NW