

# \* Partnering with the CIO

“Views from an Expert Healthcare IT Buyer”

Chuck Podesta  
CIO UC Irvine Health



\* So where are the vendors?

So you  
want to be  
my  
partner?





\*The Problem - Most Sales & Marketing People don't get us

\*“Buried with vague, impersonal, and untargeted pitches on a daily basis from people who don’t understand our business, our industry, or what makes us tick.”

\*Partnering with the  
CIO, Michael Minelli &  
Mike Barlow, 2007

# \* Reality Check No. 1

## CIOs don't have time for you!



“I consider my time my most valuable resource. As a result, I get really annoyed by people who waste my time, especially salespeople.”

- *Todd Michaud, VP of IT, Focus Brands (Carvel, Seattle's Best, Cinnabon)*

## \* Reality Check No. 2

CIOs REALLY don't have time for you!



“Vendors that pitch a generic marketing message about a product we can't use are doomed.”

- *Chuck Podesta UC Irvine Health*

## \* Reality Check No. 3

# CIOs don't like you!

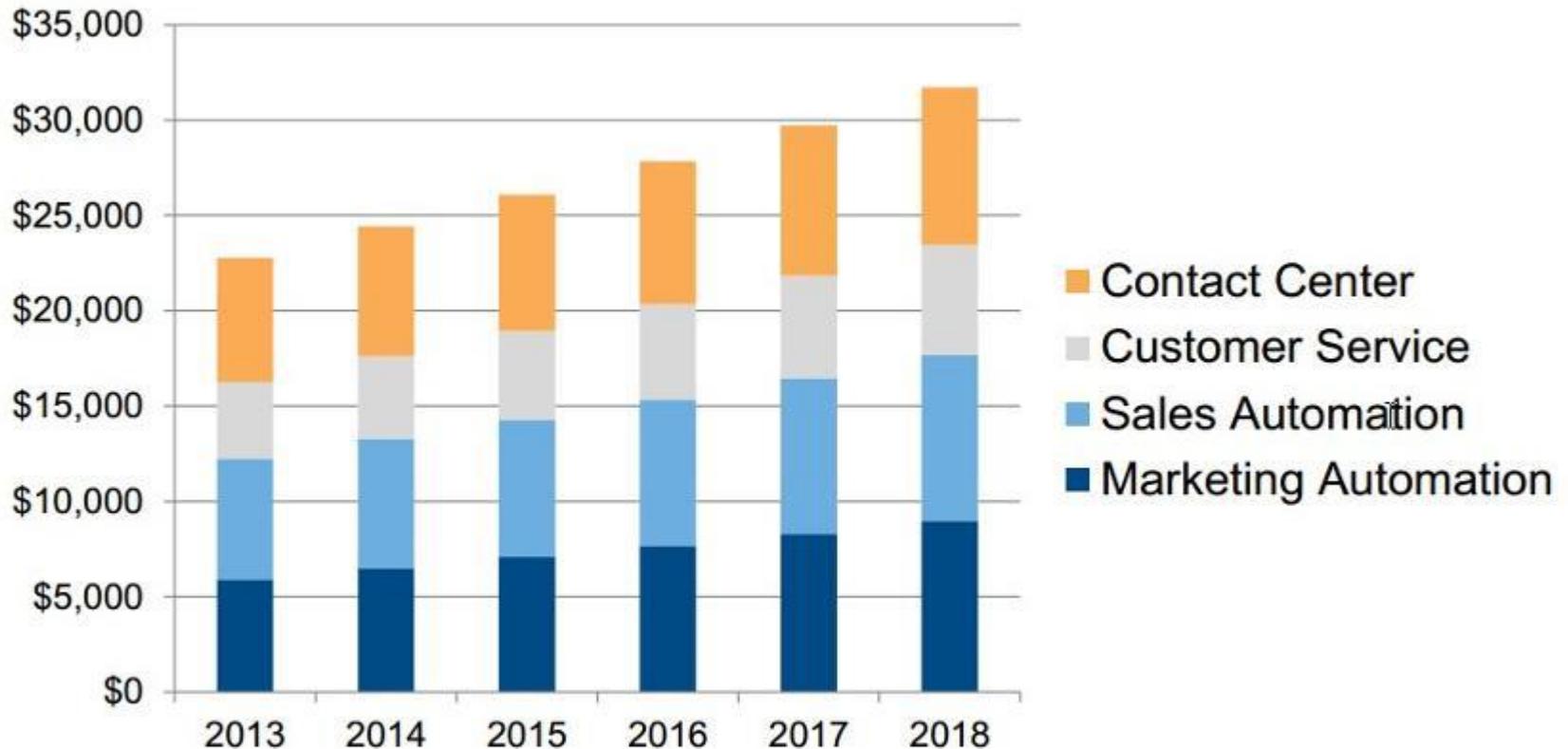


“Vendors shouldn’t approach me. If I were in the market for the product being sold, I would have contacted the vendor on my own.”

- *Chris Laping, CIO Red Robin Restaurants*

**\* CIOs are being Bombarded  
by Marketing and Sales**

# Future View – CRM Applications Market Forecast (\$M)



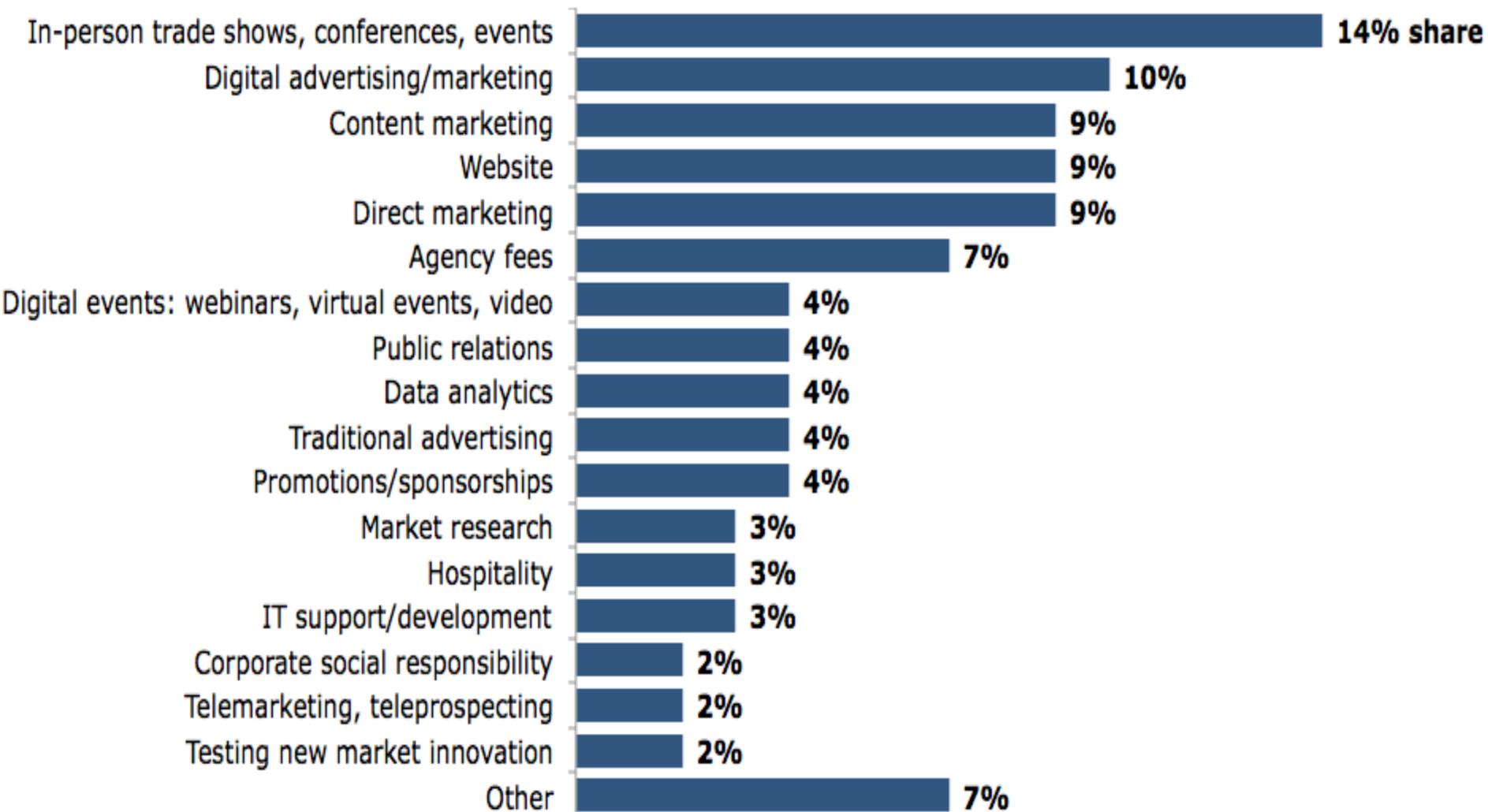
## Total Market Statistics:

- Total 2018 Revenue = \$31.7B
- Source - Dec 2014 Software Tracker
- CAGR = 6.9 %



# B2B Marketing Budget Allocations

based on combined responses from two surveys of senior B2B marketers  
**in 2015**



# \*The CIOs Dilemma

# Our Challenges

- \* Cut Costs ↔ \* Build New Capabilities
- \* Be More Efficient ↔ \* Be More Responsive
- \* Standardize ↔ \* Customize
- \* Be Secure ↔ \* Be Open
- \* Make IT Predictable ↔ \* Make Business Agile
- \* Execute Flawlessly ↔ \* Think Strategically
- \* Enterprise Goals ↔ \* Business Unit Goals

\* **We Lead a Schizophrenic life**

# Focus in Current Role

*Name the top five areas of focus in your current role*

Aligning IT initiatives with business goals	64%
Improving IT operations/systems performance	51%
Cultivating the IT/business partnership	48%
Cost control/expense management	43%
Implementing new systems and architecture	42%
Leading change efforts	39%
Driving business innovation	34%
Redesigning business processes	32%
Identifying opportunities for competitive differentiation	24%
Developing and refining business strategy	22%
Meeting with IT vendors	20%

# \*The CIOs World

Open
 Delete
 Forward
 OneNote

Actions

Invite Attendees

Attendees

Show As: **Busy**

Reminder: **None** Recurrence

Options

Private  
 High Importance  
 Low Importance

Categorize

Tags

November 2016

Su	Mo	Tu	We	Th	Fr	Sa
30	31	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	1	2	3
4	5	6	7	8	9	10

My Calendars  
 **Calendar (1)**  
 Team: Podesta, Charles

Mail  
**Calendar**  
 Contacts  
 Tasks

November 09, 2016 Search Calendar (Ctrl+E)

9 Wednesday

7 am	<b>IT Strategy Session</b> office
8 00	<b>IT Governance Meeting</b> 5101
9 00	<b>Catch-Up Call (Alan/Chuck) (Alan to call Chuck)</b>
10 00	<b>1:1 Adam/Chuck</b> Adam to call Chuck
11 00	<b>1:1 Lisa/Chuck [Robin]</b> Lisa to call Chuck [Redacted] Podesta, Charles
12 pm	<b>HAIS Director's/Project Scenario #1 Review (CR512A - Skype Meeting)</b> <b>Conf Call: Bi-Weekly UCI Project CIO Meeting</b>
1 00	<b>Candidate Interview (Mark) ; Chuck to call Mark</b> <b>Candidate Interview Susan; Chuck to call Susan -</b>
2 00	<b>Update with Chuck Podesta - Huron - 2:00 PM - 2:30 PM Pacific; Conference Call with Snadden</b> <b>Epic Conversion Discussion (Chuck's Office - (Adam to call )</b>
3 00	

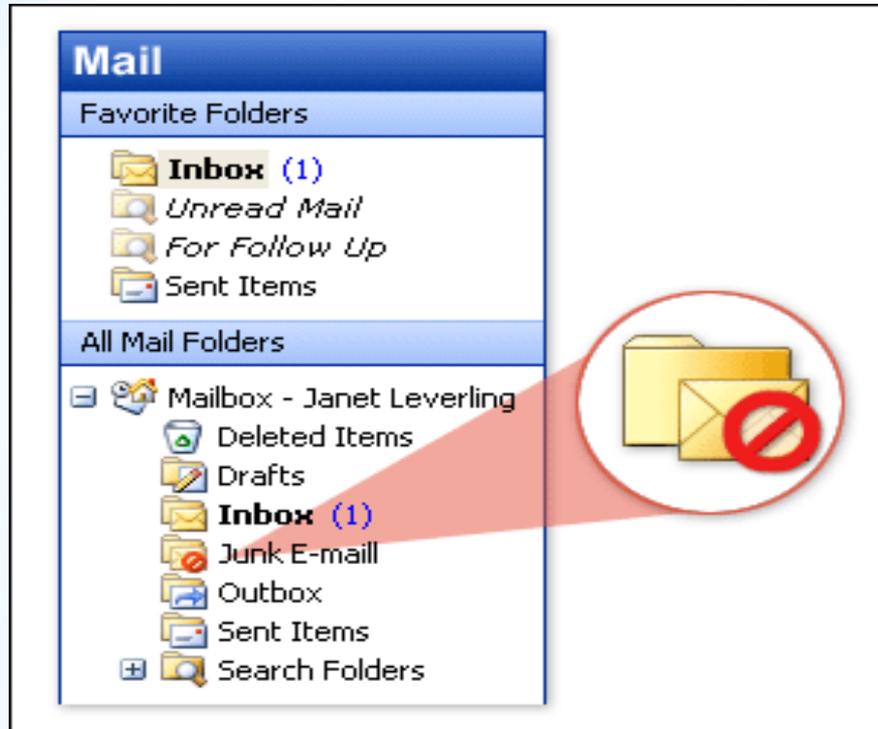
Tasks: 2 Active tasks, 0 Completed tasks



\*Oops Forgot about emails!  
Total = 344



\* Vendor Deleted - 146  
42%



# \*Vendor Junk - 66



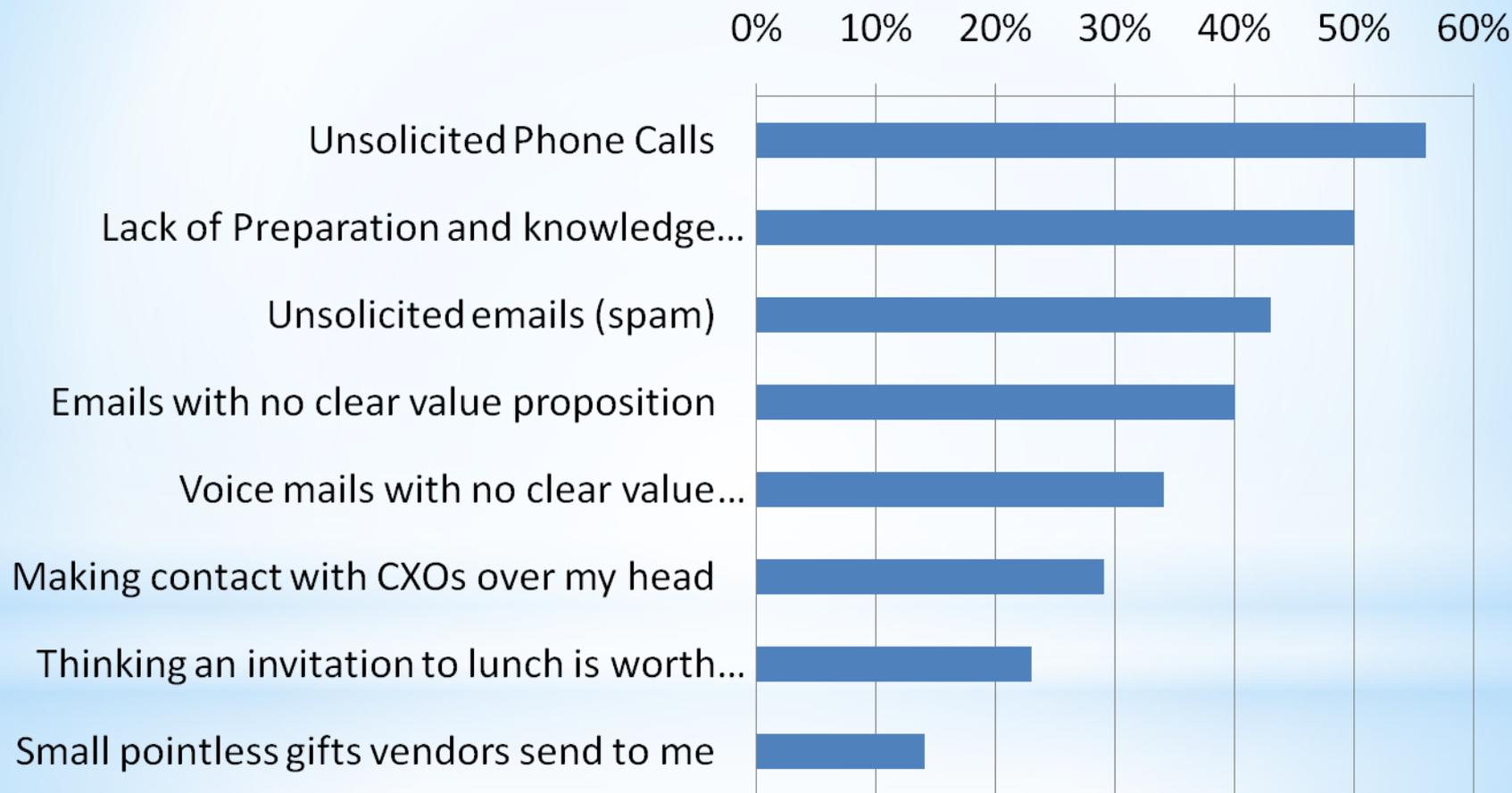
\*Other Spam : 42



\* Legit - 90

\*How to Annoy a CIO?

What are the three things about a vendor's approach that annoy you the most?



# \*The Breakup Email

Goodbye - my parting words - Message (HTML)

File Message

Ignore X Reply Reply All Forward Meeting Move OneNote Mark Unread Categorize Follow Up Translate Find Related Select Zoom

Delete Respond Move Tags Editing Zoom

Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.

From: [Redacted] Sent: Wed 11/9/2016 11:35 AM  
To: Podesta, Charles  
Cc:  
Subject: Goodbye - my parting words

Hi Charles,  
I've been emailing over the past month, and I'm guessing maybe our timing just isn't right.

If I was a different type of BDR, I would be sending you a cute picture of a puppy or kitten to try to get you to respond. But to spare your heartstrings, I'll just cut to the chase: if you ever are looking for a combined anti-virus, anti-exploit, and forensics product for your endpoint, please don't hesitate to reach out to [CentinelOne](#).

Until then, here are some resources you may be interested in:  
[CentinelOne Mitigation Demo](#)  
[Netflix Is Dumping Anti-Virus, Presages Death Of An Industry](#)  
[The Rise of Ransomware & How to Defend Against it](#)

Take care,  
[Redacted]

--  
[Redacted]  
Business Development Representative  
774-313-9220  
[Redacted]

[Redacted]

Windows Taskbar: Start, Internet Explorer, File Explorer, OneDrive, Firefox, Chrome, PowerPoint

System Tray: 6:46 PM, 11/9/2016

File Message

Ignore X Meeting

Junk Delete Reply Reply All Forward More

Delete Respond

Move OneNote Actions Move

Mark Unread Categorize Follow Up Tags

Translate Select Editing

Find Related Zoom

Zoom

Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.

From: [Redacted]

To: Podesta, Charles

Cc:

Subject: Contact Request

Sent: Wed 6/1/2016 4:40 PM

Good afternoon Charles,

I just wanted to make sure you have been contacted by [Redacted] representative. Have you had the opportunity to speak to someone already? If not, I would be happy to work with you on setting up a time to talk about our pricing model and any other topics that interest you.

Look forward to hearing from you soon.

Regards,

[Redacted]

Account Executive

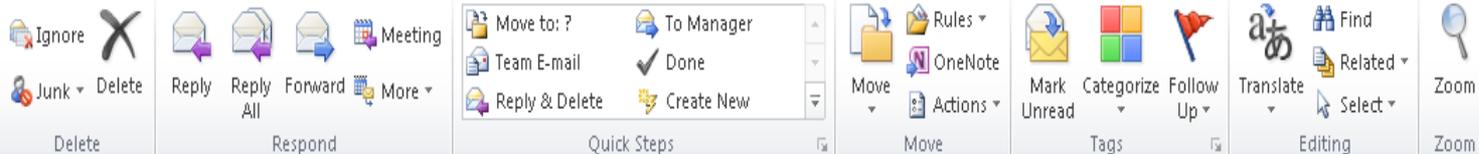
[Redacted]



[Redacted]



File Message



Links and other functionality have been disabled in this message. To restore functionality, move this message to the Inbox.  
This message was converted to plain text.

From: [Redacted]  
To: Podesta, Charles  
Cc:  
Subject: Over 20 Industry Luminaries Confirmed to Speak at the 2016 Southern California CIO Summit

Sent: Wed 11/9/2016 9:25 AM

**Register Today!**

<<https://imgssl.constantcontact.com/letters/images/sys/S.gif>> The Strongest Executive Leadership Network Webpage version <<http://campaign.r20.constantcontact.com/render>>  
 <<https://imgssl.constantcontact.com/letters/images/sys/S.gif>>  
 <<https://imgssl.constantcontact.com/letters/images/sys/S.gif>> <[http://img.constantcontact.com/ui/images1/shr\\_drw\\_left.png](http://img.constantcontact.com/ui/images1/shr_drw_left.png)> <<http://s.rs6.net/t?e=nWR9GGqY7g8&c=1&r=1>>  
 <<http://s.rs6.net/t?e=nWR9GGqY7g8&c=3&r=1>> <<http://s.rs6.net/t?e=nWR9GGqY7g8&c=4&r=1>> <[http://img.constantcontact.com/ui/images1/shr\\_drw\\_divider.png](http://img.constantcontact.com/ui/images1/shr_drw_divider.png)> <<http://s.rs6.net/t?e=nWR9GGqY7g8&c=5&r=1>> <[http://img.constantcontact.com/ui/images1/shr\\_drw\\_right.png](http://img.constantcontact.com/ui/images1/shr_drw_right.png)> <<http://myemail.constantcontact.com/Over-20-Industry-Luminaries-Confirmed-to-Speak-at-the-2016-Southern-California-CIO-Summit.html?soid=1102424019438&aid=nWR9GGqY7g8#fblike>>

<<https://imgssl.constantcontact.com/letters/images/sys/S.gif>>  
 <<http://r20.rs6.net/on.jsp?a=1102424019438&r=3&c=535a0d30-0fa1-11e5-98f8-d4ae528ed502&d=1126346065439&ch=53c83850-0fa1-11e5-992a-d4ae528ed502&ca=0354e1bc-7b71-400d-8a29-18ccd21690ae&o=https://imgssl.constantcontact.com/ui/images1/s.gif>>

<[r20.rs6.net/tn.jsp?](http://r20.rs6.net/tn.jsp?)

[f=001Rjb6GaSz7ARxE8M8nGa3z0UPDukuRfCUp3ya290hUAwfyRNXvc1HD9xnQybkctNrOCGF6ObLAsyXhs8rQlZW2nzowWJM60ltjoNDMqsBs6OWSOSUs5BqX4TQGkjFXA4FrvBy9BvCFON5FY74k9gOUBruJCI8BTSUQEBAy uCORSz1OBhxCNF9kjO1SRx2XMryKAb1BPafU4 iePijFKT0GIWTSflP EjrG&c=wKUF7xu2b159509Ox053ouEbGhlyjlkFviuuL4Bjt7w73RIKb6y4 g==&ch=I76bDZC9ID2qn1PRxa-B4UUIP1V5XiwNVz8msUWgibqb-RzKVr8DWA==>](http://r20.rs6.net/tn.jsp?)

The CIO as CEO of Technology: <<http://r20.rs6.net/tn.jsp?>

[f=001Rjb6GaSz7ARxE8M8nGa3z0UPDukuRfCUp3ya290hUAwfyRNXvc1HD9xnQybkctNrOCGF6ObLAsyXhs8rQlZW2nzowWJM60ltjoNDMqsBs6OWSOSUs5BqX4TQGkjFXA4FrvBy9BvCFON5FY74k9gOUBruJCI8BTSUQEBAy uCORSz1OBhxCNF9kjO1SRx2XMryKAb1BPafU4 iePijFKT0GIWTSflP EjrG&c=wKUF7xu2b159509Ox053ouEbGhlyjlkFviuuL4Bjt7w73RIKb6y4 g==&ch=I76bDZC9ID2qn1PRxa-B4UUIP1V5XiwNVz8msUWgibqb-RzKVr8DWA==>](http://r20.rs6.net/tn.jsp?)

The Courage to <<http://r20.rs6.net/tn.jsp?>

[f=001Rjb6GaSz7ARxE8M8nGa3z0UPDukuRfCUp3ya290hUAwfyRNXvc1HD9xnQybkctNrOCGF6ObLAsyXhs8rQlZW2nzowWJM60ltjoNDMqsBs6OWSOSUs5BqX4TQGkjFXA4FrvBy9BvCFON5FY74k9gOUBruJCI8BTSUQEBAy uCORSz1OBhxCNF9kjO1SRx2XMryKAb1BPafU4 iePijFKT0GIWTSflP EjrG&c=wKUF7xu2b159509Ox053ouEbGhlyjlkFviuuL4Bjt7w73RIKb6y4 g==&ch=I76bDZC9ID2qn1PRxa-B4UUIP1V5XiwNVz8msUWgibqb-](http://r20.rs6.net/tn.jsp?)



- \*The forward forever email
- \*I'm in the area call
- \*The white paper offer
- \*The pretend to know me email
- \*The half gift

## \*Other Bad Behaviors

 **What Does Work?**

File Message

Ignore X Reply Reply All Forward Meeting  
Delete Delete All Respond

Move to: ? To Manager  
Team E-mail Done  
Reply & Delete Create New  
Quick Steps

Move Rules OneNote Actions  
Move

Mark Unread Categorize Follow Up  
Tags

Translate Related Select  
Editing

Zoom Zoom

You forwarded this message on 8/5/2016 10:01 AM.

Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.

From: [REDACTED]

Sent: Fri 8/5/2016 9:18 AM

To: Podesta, Charles

Cc:

Subject: RE: Successful Epic cultures: The talent behind the technology

Message [REDACTED] - Overview Brochure.pdf (2 MB)

Hi Chuck,

I thought I would reach out and share a little more information about [REDACTED] and what we do. From experience, I know that you are likely receiving several messages offering Epic staff support. I also know that it is difficult to determine which firms have the experience you really need. Unlike many large vendors, [REDACTED] only focuses on Epic. We were born Epic, and we continue to live Epic. That means that we continue to treat customers and projects as our own personal responsibilities. We are not in the volume/numbers game. We don't want to be everything to everyone, but rather the best partner for an organization looking for Epic expertise.

We focus on knowledge transfer, long term sustainability, and independence. We do what we are good at, and we are good at what we do. To date, [REDACTED] has made a total of over 300 Epic-centric placements. We've worked with over 70 Epic customers to date and received the highest score for Epic Implementation Staffing & Support as well as Quality of Staff in the most recent Epic-specific KLAS report.

I'd love the opportunity to hear more about your roadmap and see where we can lend experience and/or support.

Have a great weekend!

[REDACTED]  
Director - Client Discovery  
[REDACTED]

[REDACTED]

[REDACTED]



- \*The referral
- \*Knowledge without strings
- \*Sponsored forums
- \*Hosted webinars
- \*Industry events

**\*Relationship before Selling**

- \* Don't be arrogant or a know it all.
- \* Do your homework and be data driven.
- \* Put skin in the game.
- \* Going deep is more profitable than going wide.

\* **How to Partner once you've made contact?**

\* Reality Check  
No. 4

Surprise!  
CIOs want  
PARTNERS



\*“It’s not adversarial. We are trying to sell our organizations on what you are trying to sell us!”

\*Partnering with the  
CIO, Michael Minelli &  
Mike Barlow, 2007

- \* Credibility and trust
- \* The right message
- \* Shared Risk and Reward

*EQUALS*

\* Potential Partner

<https://www.youtube.com/watch?v=q8LaT5liwo4>

\* Oh and One more Thing