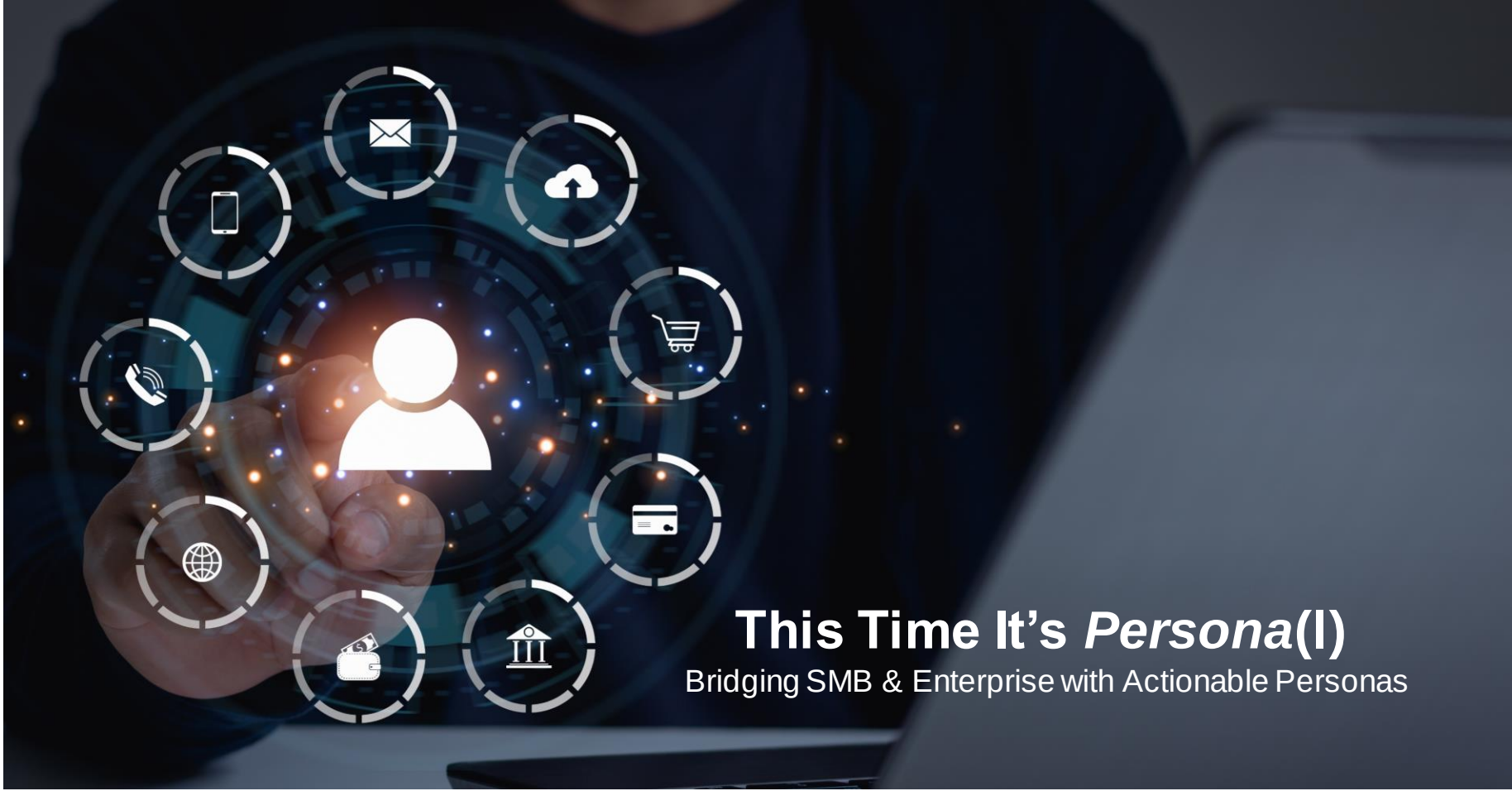

This Time It's *Persona*(l)

Bridging SMB & Enterprise with Actionable Personas

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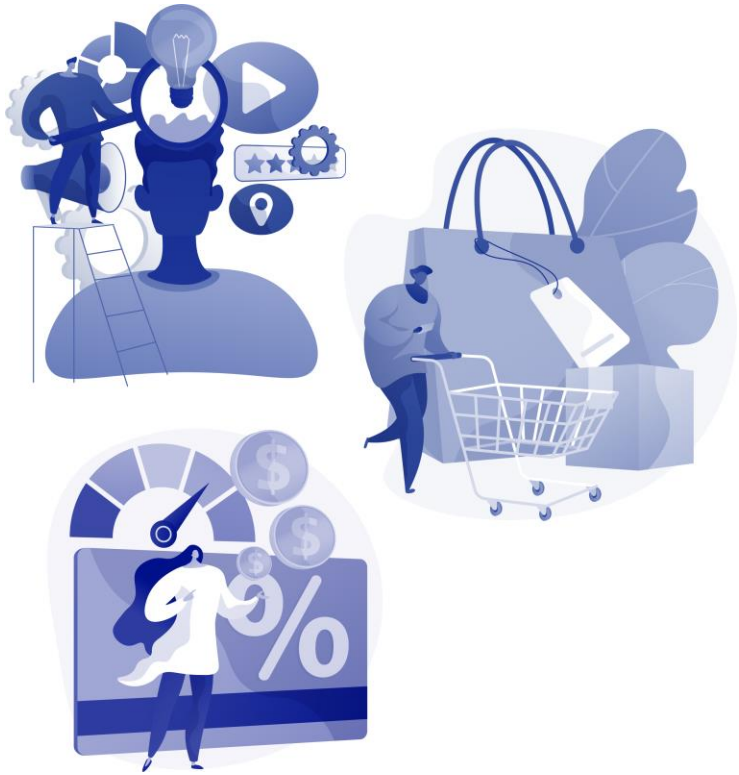
Overview

Research-based archetypal (modeled) representations of ***who*** buyers are, ***what*** they are trying to accomplish, ***what*** goals drive their behavior, ***how*** they think, ***how*** they buy, and ***why*** they make buying decisions.



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Overview

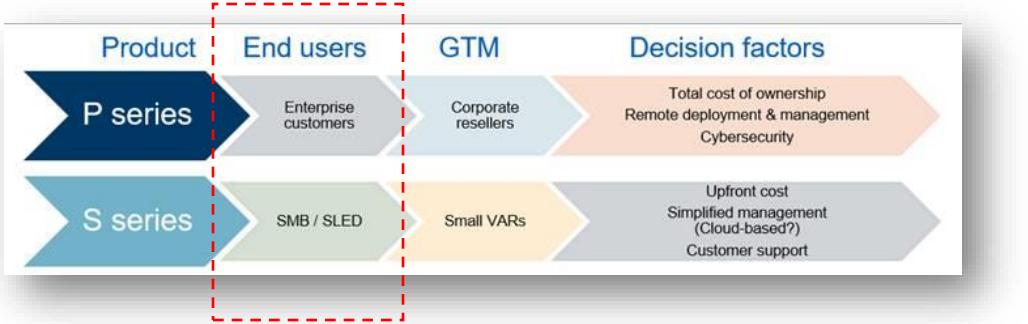
What is an IT Pro Persona?

- An IT Pro persona describes a tech-savvy professional who plays a critical role in managing and maintaining an organization's IT infrastructure. They possess expertise in areas such as network administration, cybersecurity, and system optimization, ensuring that technology operates smoothly to support business operations and data security. Personas represent different user types that might use our services, products, or engage with our brand in a similar way.

Purpose: Why is this important?

- Enhance our comprehension of our audiences to improve product launches, create more targeted content, and generate leads effectively.
- Persona research and training materials can be used to educate new/existing Eaton employees, helping them get up to speed swiftly with targeted audience.
- Expand your network within Eaton and among channel partners, offering opportunities to connect with new individuals.

Consider these end user insights



- **Eaton product purchasing patterns:** What methods do customers use to buy Eaton products?
- **Frequency of purchasing Eaton services and software:** How often do customers purchase Eaton's corresponding services and software?
- **Dependence on product reviews:** To what extent do customers rely on product reviews in their decision-making process?
- **Factors influencing vendor selection:** What are the key factors that drive customers' choice of vendor? Is the decision typically made by an individual or by a group?

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Diverse D-IT Market Segments

Applications

Work-stations, Individual PC backup	Network closets / edge, MDF/IDF, wireless access point, digital recording	Large datacenter Hyperscale's, Financials, Co-locations	Niche markets Automation, Wastewater trt, Marine systems, ODM attach

Channels to Market

Distributors to VARs	DMR, eTailers	Mfg REPs	Via OEM	Direct

Customer Type

Consumer Small office/ home office, Individual users purchasing through retail	SMB; Small to med bus.; B2B, K-12, SLED/Fed	Enterprise; Large Corp., Multi-site, Colleges, Hospitals	OEM/ODM Integration, accessory attach, Med. device

Decision Maker Personas

IT Managers	Facilities Managers	Consulting Engineering Firms

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IT Target Audience

- Tech-savvy
- Critical thinkers
- Diverse sectors
- Security-conscious
- Efficiency-seekers
- Compliance-oriented
- Budget-aware
- Scale and complexity
- Risk mitigators
- Innovation-driven
- Environmentally conscious

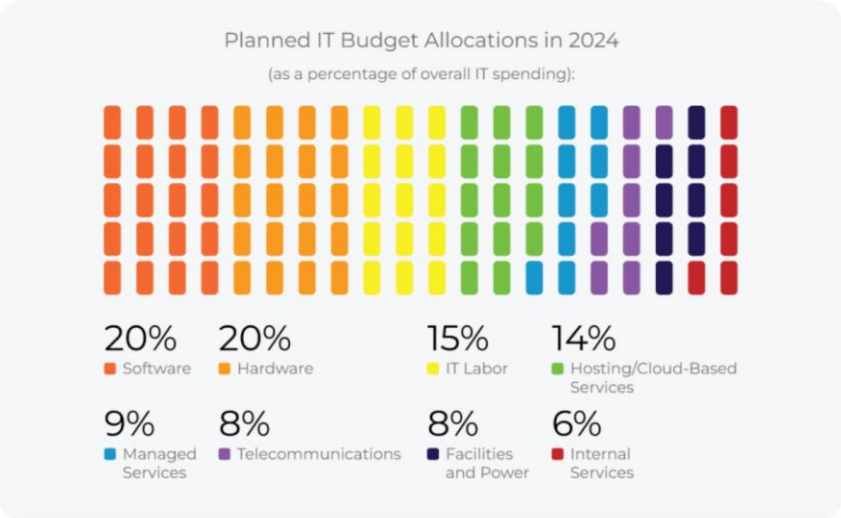
- 25-54 professional/managerial
- Household income $75K+
- College graduate
- Married
- Super influencer for computers & technology

IT Roles

- Database administration/data management
- Hardware support
- Helpdesk/user support
- Hiring/development/training
- IT architecture/network infrastructure
- IT budget oversight/purchasing
- Risk management/disaster recovery/cybersecurity
- Software/application support
- System/server administration
- Telecommunications
- Software development

- Web Database Administration/Data Management
- Hardware Support
- Helpdesk/User Support
- Hiring/Development/Training
- IT Architecture/Network Infrastructure
- IT Budget Oversight/Purchasing
- Risk Management/Disaster Recovery/Cybersecurity
- Software/Application Support
- System/Server Administration
- Telecommunications
- Web/Software Development

State of IT 2024



Credit: Spiceworks 2024 State of IT: https://www.spiceworks.com/research/state-of-it/?utm_source=webbiquity

Content

- **Existing Content and Tools:**
  - Pathfactories for K-12 and higher education
  - Relevant tools: UPS selector, PDU selector, BidMan, etc.
  - Which Eaton.com / SwitchOn topic pages are most relevant?
  - Importance of online research to the audience
  - Availability of success stories
  - Utilization of the IT campaign (desk toys) to reach this audience
- **Promoting Content:**
  - Methods to deliver content to this audience
  - Content activation plan
  - Sales teams' use of content to reach their audience
  - Familiarity with using Sales Hub

Relevant Topics

- Sustainability
- Energy transition
- Cybersecurity
- Edge computing
- AI
- Hybrid/remote work
- Cloud
- Brightlayer
- Compliance
- Disaster recovery

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Current Audience Engagement

- How does Eaton reach our targeted audience?
  - Emails (channel partners, consultants, etc.)
    - Nurture email programs
  - Blogs
    - Distributor Newsline
  - Social Media/Online Communities
    - FB/X/LI
    - Spiceworks/Reddit/Discord
  - Webinar/Virtual Events
  - Other
    - Yammer
    - Surveys
    - Interactives
    - Loyalty programs (Sales?)
    - Podcast guest appearances

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IT Pro Customer Journey Map

SAYS			
How much does it cost?	How do I choose the right product?	How do you compare to APC?	Aren't you more expensive?
How quickly can I get it?	Why haven't I heard of you?		

THINKS			
I've never heard of you	Will you be around when it breaks?	This is too complicated for something I rarely think about	I need to get the most out of my limited budget
Don't' call me	I need help	Make it easy for me	Don't BS me

DOES			
Reads reviews	Seeks peer input	Researches via search engines	Loyal to vendors that are reliable
Checks website	Gets multiple quotes	Engages when they see value	

FEELS			
Treat me like a real person	Enjoys technical challenges	Treat me like a real person	Exasperation with users
Not appreciated	Misunderstood	Isolated	Overwhelmed
What I do is vital to the business	I deserve respect	Wants to help	

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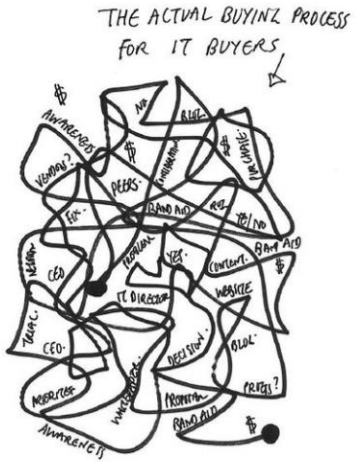
Economic Concerns and IT Challenges in 2024

- **Concerns of Recession in 2024:**
  - 84% of surveyed companies fear a 2024 recession, irrespective of size, industry, or location
- **Recession Preparedness Measures:**
  - Business Process Changes: **81%**
    - Cut non-essential spending
    - Adapted offerings
    - Renegotiated terms
    - Outsourced tasks
    - Closed facilities
    - Formed partnerships
    - Targeted specific customers
  - Tech Purchasing Adjustments: **74%**
    - Reduced user licenses
    - Postponed buying
    - Merged technologies
    - Reviewed vendor agreements
    - Opted for cost-effective services
    - Removed unused infrastructure
  - Workforce Management: **43%**
    - Decreased hiring rates
    - Executed layoffs



(Credit: Spiceworks 2024 State of IT: https://www.spiceworks.com/research/state-of-it/?utm_source=webbiquity)

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Journey Map: SMB IT Pro

Awareness	SMB IT professionals learn about Eaton's products and services through online advertising, trade shows, and industry forums.
Consideration	They explore Eaton's offerings, focusing on cost-effective solutions to protect their business from power-related disruptions.
Decision	SMB IT pros decide based on budget constraints and product reliability, choosing Eaton's products for power backup and distribution.
Purchase	They make purchases directly from Eaton's website or through local resellers.
Installation	SMB IT professionals or hired technicians install Eaton's equipment.
Operation and Support	They use Eaton's power management tools for basic monitoring and may contact customer support for assistance.
Feedback and Referral	Satisfied SMB IT pros provide positive feedback and may refer Eaton to other SMBs.

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Persona: SMB

<1,000 employees

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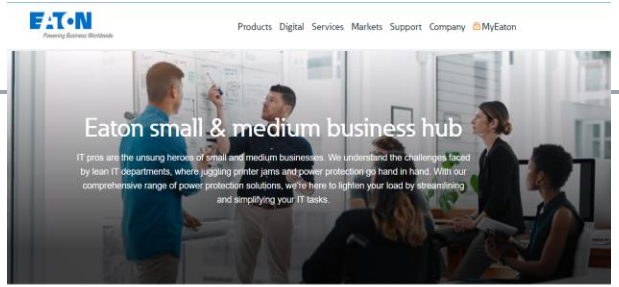
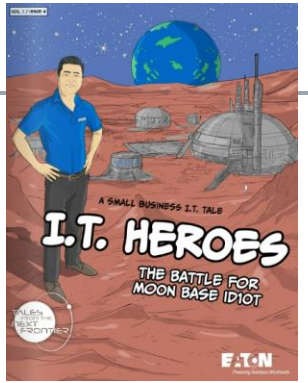
Resources

1. **SMB solution hub**
2. **Solution videos**
3. **Presentations**
4. **Playbooks**
5. **Interactives**
6. **Creative**
   - https://itnextfrontier.eaton.com/tales/it-heroes-and-the-battle-for-moon-base-id10t/





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Persona: SMB (Template)

Personal

Age: 45-55
Job Titles:
Director of Engineering, Senior Electrical Eng, Head of Data Centre Design

Education: University
BSc, MSc, PhD, IEEE, Association

Social Network: LinkedIn

Communication method: phone, email, face to face.

Company size: <1,000 employees

Info sources: Journals, Associations, Webinars, Conferences, Vendors, CPD content

Reports to: Technical Director, BoD

Knowledge

Depth & breadth of Engineering Skills. Reality is more hit & miss.

System Design, Elec, Controls, HVAC, Regulations, Planning, Standards

RFP, Vendor adjudication

Challenges

Design: Changing technology, design, customer requirements, timescales. Immense pressure on cost reduction by design (value engineering)

Program Management: Dealing with Customer needs Vs Contractor agenda Vs Vendor performance

Keeping up to date

Complexity of a data centre new build

Job Functional Responsibility

Depends on SoW. From advice on design, tech and vendor. To complete design and delivery. Must show high value and domain expertise

Key Measurement: Customer satisfaction, projects deliverables

Goals Objectives

Quality engineering designs, documentation and advise

Satisfied customer. Project deliverables, on time, cost, quality

Cares Most About

Being correct, Adding Value, Personal and Company Reputation

Securing high profile accounts/projects

Industry profile

Tools needed to do their job

Documentation Control System. CAD, Reporting SW, Project SW, Eng Tools

Stage: their project involvement

Earliest possible instance, project inception, pre project

Role in purchase / win process

Will prequalify, approve or recommend technical & company choice

Persona: Enterprise

>1,000 employees

Powering Business Worldwide

Persona: Enterprise (Template)

Personal

Age: 45-55
Job Titles:
Director of Engineering, Senior Electrical Eng, Head of Data Centre Design

Education: University
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Enterprise sales playbook

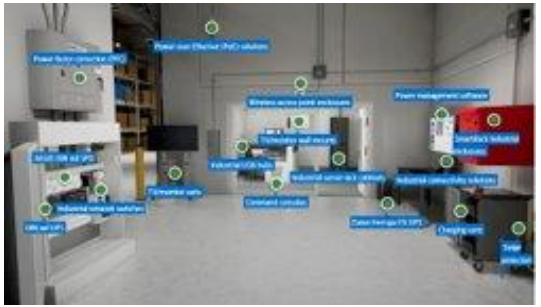
Link

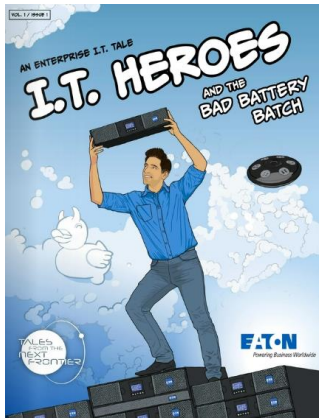
Enterprise solutions brochure

Link

Resources

1. Enterprise solution hub
2. Solution videos
3. Presentations
4. Playbooks
5. Interactives
6. Creative
   - SwitchON
   - IT: The Next Frontier





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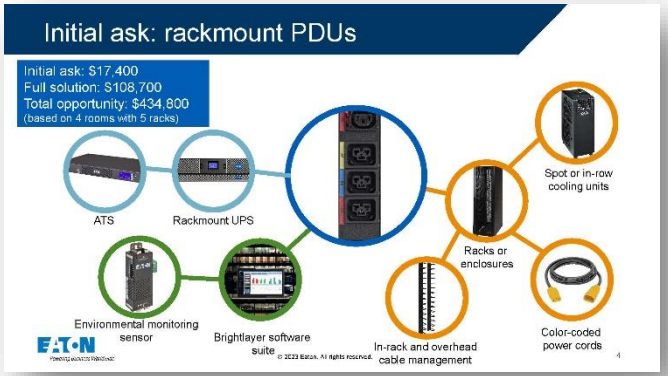
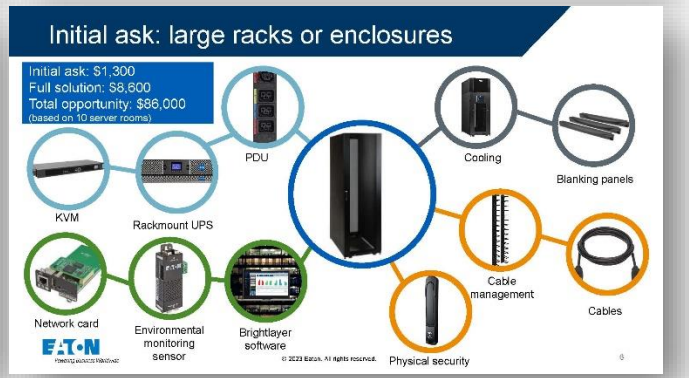
Enterprise playbook: PowerPoint slides

Link





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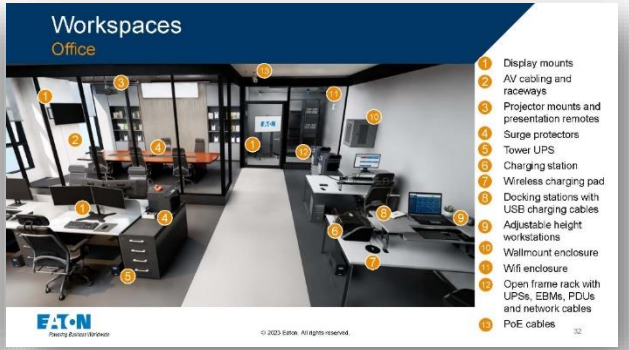
End user presentation

Link



SMB vs Enterprise

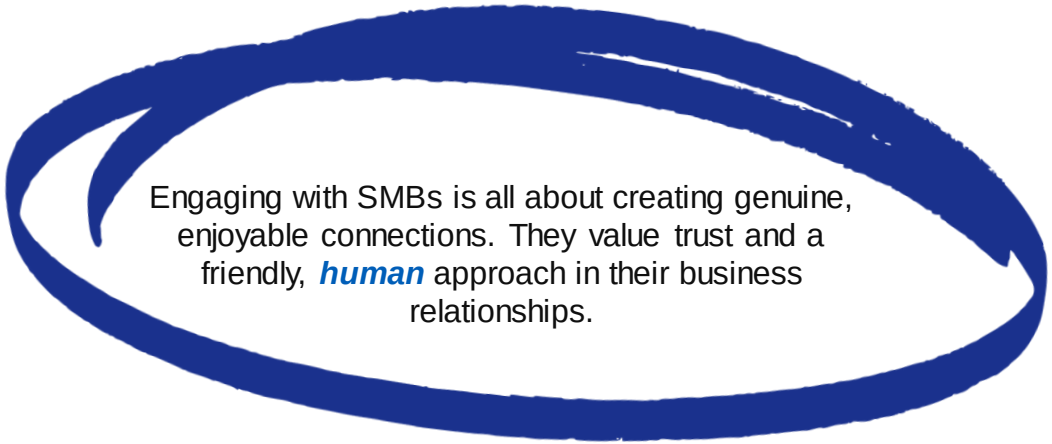
	Small	Enterprise
Number of employees	<1,000	1,000+
Revenue	<$50M - $1B	>$1B

Key Differences

	Enterprise	SMB
Length of time	The length of time spent on the sales process is usually longer the more valuable the deal is. Enterprise sales cycles can be many months to a year in the making.	
Ease of purchase	Requires a PO. Terms and conditions may be required.	Often make purchases themselves.
Number of decision makers	Typically a more formal process involving 10+ stakeholders. The larger the deal, the more decision makers will come into play as it gets closer to close.	Sometimes only one. Generally <5
Level of impulsivity	At enterprise levels, there is more deliberation.	For lower-priced products, purchasing decisions can be impulsive and quick as the price point is usually lower.
Pain points	At the enterprise level, much of the pain is around the company's potential needs in the years to come.	At self-service, SMB, and mid-market sales levels, the customer's pain is around the business's immediate needs or an individual's.
Farming or hunting	Finding leads is more of a farming process than a hunting process at the enterprise level. Sales reps find a strategic, ideal account and spend lots of time grooming them for purchase.	The strategy is different in lower-tier sales cycles, where salespeople discover prospects rather than developing them.
Buyer type	Enterprise salespeople need to know their market deeply. They need to understand the competition and their placement against them, know the account's needs, and align with competitor offerings.	SMB and mid-market sales reps have less pressure to understand big-picture implications and just need to focus on the stage of their prospects.
CAC to LTV ratio	At the enterprise level, your customers' lifetime value (LTV) justifies a more resource-intensive process with a higher customer acquisition cost (CAC).	With SMBs or mid-market sales, more automation or a less-intensive sales process is important considering the average customer's lower LTV.

Key Differences (Cont.)

	Enterprise	SMB
Scale and Complexity	Enterprises typically have larger and more complex IT infrastructures with extensive networks, data centers, and diverse systems.	SMBs have smaller-scale operations with simpler IT setups.
Budget	Enterprises often have substantial IT budgets and can invest in cutting-edge technologies.	SMBs have more limited resources and need to be cost-conscious.
Specialization	Specialize in specific areas such as network architecture, cybersecurity, or data analytics.	SMB IT professionals often have broader roles and handle a wider range of IT tasks.



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Key Differences: Job Itself

	Enterprise	SMB
Autonomy	Less autonomy in enterprise environment where things may already be established by CTO and overhauling things requires multiple teams an decision makers. Enterprise may have more funding for more sophisticated tech stack but not always. “Being a tiny cog in a huge machine isn't my idea of opportunity. You feel like you lack autonomy in your current position because giant bureaucracies are designed to make sure nobody becomes valuable and everyone remains an easily replaceable part.”	As the lone IT pro or member of a smaller team, there’s more autonomy. If you’re the IT leader, you have significant say in what’s used and deployed. “I'm the only person in IT "department" - I take care of everything: servers, network, software, printers, cctv, voip, user "help" - including helping people to learn how to use a computer - skype, mail, office.” u/n0n3_i_am
Collaboration	In an enterprise environment, you’ll be able to learn from and work with a wide variety of people with different types of expertise. There may be opportunities to specialize.	While you may be able to collaborate within smaller teams and other departments, the overall collaboration pool will be smaller.
Anonymity	While there may be opportunities to be visible, lead teams, etc., you can also work quietly in an anonymous fashion—at least somewhat hidden from your immediate IT team(s). “Enterprise "system" administrators have trouble interacting with others in the absence of a structured set of policies and guidelines to specify how they should communicate with this hooman who has walked into their office asking questions. The typical reflexive response is to pass the buck to somebody else, but in an SMB environment there might not be anybody else. Best run back and hide in your nice neat silos and layers of bureaucracy before you have to take some real personal responsibility.” u/Generico300	In an SMB, you may be the lone IT person in charge of communicating with the rest of the company and other departments are more likely to know who you are.

What now? Enterprise

Understand the organizational structure: learn about the enterprise's multiple divisions and stakeholders.

Align with strategic goals: position your product/service in line with the enterprise's long-term strategic objectives.

Prepare for a longer sales cycle: plan for and navigate through the complex, multi-layered decision-making process.

Focus on formal, detailed communications: use detailed presentations and formal proposals that address strategic impacts and benefits.

Leverage upselling opportunities: look for opportunities to offer additional value through upselling and cross-selling, given the complexity and size of enterprises.

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What now? SMB

Build personal connections: focus on nurturing relationships. SMBs value trust and personal attention.

Understand their growth goals: tailor your solutions to directly support their growth and survival strategies.

Communicate clear ROI: SMBs are budget-conscious. Show them how your product/service offers clear, immediate benefits.

Utilize various communication channels: engage through social media, local networks, and direct calls to reach SMB decision-makers.

Adapt quickly to feedback: SMBs often have simpler decision-making processes. Use this to your advantage by quickly adapting to their needs and feedback.

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Eaton.com

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Persona: Data Center

(Kat)

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Persona: Data Center Consultant (Template)

Personal

Name:
Consulting Charles
Age: 45-55
Job Titles:
Director of Engineering, Senior Electrical Eng, Head of Data Centre Design

Education: University
BSc, MSc, PhD, IEEE, Association

Social Network: LinkedIn

Communication method: phone, email, face to face.

Company size: Typical 50-200
Exceptions 5-10, 1-5k

Info sources: Journals, Associations, Webinars, Conferences, Vendors, CPD content

Reports to: Technical Director, BoD

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Securing high profile accounts/projects

Industry profile

Tools needed to do their job

Documentation Control System. CAD, Reporting SW, Project SW, Eng Tools

Stage: their project involvement

Earliest possible instance, project inception, pre project

Role in purchase / win process

Will prequalify, approve or recommend technical & company choice

Key Eaton Products: Data Center

Product	Link

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Typical IT Buying Process

Identify Needs	IT professionals first identify the specific needs or problems within their organization that require a technology solution. This could involve assessing hardware, software, or services requirements.
Research	They research available products or services that can address their needs. This often includes reading reviews, comparing features, and evaluating vendors.
Budgeting	Once they have a better understanding of the options, IT professionals work on budgeting for the purchase. They need to ensure that the chosen solution aligns with their allocated budget.
Vendor Selection	IT pros select a vendor or supplier that offers the product or service they need. This decision is based on factors such as reputation, pricing, customer support, and compatibility with existing systems.
Proposal & Approval	They may need to create a proposal outlining the benefits and cost-effectiveness of the chosen solution. This proposal is then presented to their organization's decision-makers for approval.
Purchasing	After receiving approval, they proceed with the actual purchase. This involves negotiating terms, signing contracts, and processing payment.
Implementation	Once the product or service is acquired, IT professionals work on implementing it within their organization. This may involve installation, configuration, and training.
Testing & Evaluation	IT professionals rigorously test the new solution to ensure it meets their requirements and functions as expected.
Integration	They integrate the new technology into existing systems and processes to ensure seamless operations.
User Training	End-users or employees may need training on how to use the new technology effectively.
Maintenance & Support	IT pros are responsible for ongoing maintenance, updates, and support for the purchased solution to ensure its continued functionality and security.
Evaluation and Feedback	Periodically, IT professionals assess the performance and impact of the technology solution and gather feedback from users to make improvements if necessary.
Documentation	They maintain documentation related to the purchased solution, including user manuals, configurations, and support contacts.
Renewals or Upgrades	Depending on the nature of the solution, they may need to consider renewing subscriptions or planning for future upgrades.
Security & Compliance	IT professionals continuously monitor the security and compliance aspects of the solution to safeguard their organization's data and operations.
End-of-Life Planning	Eventually, they plan for the end-of-life of the technology solution, including data migration and disposal of hardware if applicable.

Journey Map: Data Center IT Pro

Awareness	Data Center IT professionals become aware of Eaton's products and services through industry events, online research, and word-of-mouth.
Consideration	They research Eaton's backup power and distribution equipment, power management products, and solutions that fit their data center needs. They explore features, specifications, and compatibility.
Decision	After evaluating options and cost-effectiveness, they make a decision to purchase Eaton's products to ensure business continuity and protect against power-related threats.
Purchase	They place orders through Eaton's website or authorized distributors, taking advantage of any promotions or support services.
Implementation	Eaton's products are installed within the data center, and IT professionals may receive technical support during this phase.
Monitoring and Maintenance	Data Center IT professionals continuously monitor Eaton's equipment and use power management tools to ensure smooth operations and prevent downtime.
Feedback and Loyalty	They provide feedback on product performance and may become loyal customers if Eaton's solutions meet their needs effectively.

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Journey Map: Enterprise IT Pro

Awareness	Enterprise IT professionals become aware of Eaton through industry publications, peer recommendations, and conferences.
Consideration	They evaluate Eaton's comprehensive solutions, looking for scalability, redundancy, and reliability to support critical operations.
Decision	After careful consideration, they opt for Eaton's products and services for their large-scale IT infrastructure.
Procurement	Enterprises engage in complex procurement processes, negotiating contracts and terms with Eaton.
Deployment and Integration	Eaton's solutions are deployed, and extensive integration efforts take place within the enterprise's existing infrastructure.
Continuous Monitoring	Enterprise IT pros use Eaton's power management tools for advanced monitoring, predictive maintenance, and compliance management.
Feedback and Partnership	They maintain an ongoing partnership with Eaton, providing feedback for product improvements and exploring opportunities for joint projects.

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Persona: Education

TBD

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Journey Map: Education

Awareness	Education IT professionals discover Eaton's offerings through educational technology conferences, online communities, and recommendations from peers.
Exploration	They explore Eaton's products and solutions that fit within the educational institution's budget.
Decision	Considering the educational institution's needs, they choose Eaton's products for power protection and management.
Purchase	The institution's procurement department handles the purchase, often through a competitive bidding process.
Deployment and Training	Eaton's solutions are deployed in educational facilities, and IT professionals receive training to manage the equipment.
Educational Resources	Eaton provides educational resources to help IT pros optimize power management within educational environments.
Ongoing Support	They use Eaton's support services and may engage in periodic assessments of their power infrastructure.

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Education Personas

Education sector	End user profiles to target		Key Considerations
K-12 Elementary, middle, high schools	Decision Makers • IT director • Principal • County level (technology department) • Network administration (state level)	Influencers: • Education board • Teachers • State and local gov't officials	• Location within the US and Canada • Size of the institution • Private vs public institutions • Government, state, private funding • Education laws that hinder decision power
Higher Ed Degree granting institutions: Community colleges, colleges, universities, and post-graduate institutions	Decision Makers • IT department head/dean • IT facility manager • CTO or IT director • Network administrator	Influencers: • Students • Education board • State and local government	

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Persona: Education (Template)

Personal

Name:
Consulting Charles
Age: 45-55
Job Titles:
Director of Engineering, Senior Electrical Eng, Head of Data Centre Design

Education: University
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RFP, Vendor adjudication

Challenges

Design: Changing technology, design, customer requirements, timescales. Immense pressure on cost reduction by design (value engineering)

Program Management: Dealing with Customer needs Vs Contractor agenda Vs Vendor performance

Keeping up to date

Complexity of a data centre new build

Job Functional Responsibility

Depends on SoW. From advice on design, tech and vendor. To complete design and delivery. Must show high value and domain expertise

Key Measurement: Customer satisfaction, projects deliverables

Goals Objectives

Quality engineering designs, documentation and advise

Satisfied customer. Project deliverables, on time, cost, quality

Cares Most About

Being correct, Adding Value, Personal and Company Reputation

Securing high profile accounts/projects

Industry profile

Tools needed to do their job

Documentation Control System. CAD, Reporting SW, Project SW, Eng Tools

Stage: their project involvement

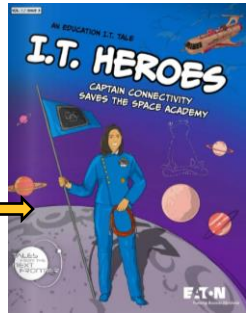
Earliest possible instance, project inception, pre project

Role in purchase / win process

Will prequalify, approve or recommend technical & company choice

Key Eaton Products: Education

Product/Topic	Helpful Links
Server rack enclosures and cabinets	https://tripplite.eaton.com/pages/server-racks-and-cabinets-overview
Brightlayer Data Centers suite	https://www.eaton.com/us/en-us/digital/brightlayer/brightlayer-data-centers-suite.html?source=promotion&utm_medium=itnf_website&utm_campaign=promotion_itnf
Creative campaign: *Captain Connectivity Saves the Space Academy*	https://www.itnextfrontier.eaton.com/tales/captain-connectivity-saves-the-space-academy/
Eaton Education Solutions Hub	https://www.eaton.com/us/en-us/products/backup-power-ups-surge-it-power-distribution/education-hub.html?source=promotion&utm_medium=itnf_website&utm_campaign=promotion_itnf
9PX UPS	https://www.eaton.com/us/en-us/catalog/backup-power-ups-surge-it-power-distribution/eaton-9px-ups.html?source=promotion&utm_medium=itnf_website&utm_campaign=promotion_itnf



Powering Business Worldwide

Persona: Healthcare

TBD

Powering Business Worldwide

Journey Map: Healthcare

Awareness	Healthcare IT professionals become aware of Eaton through healthcare industry events, publications, and healthcare technology forums.
Assessment	They assess Eaton's solutions for healthcare facilities, focusing on critical power protection and compliance.
Decision and Compliance	After ensuring Eaton's solutions meet regulatory requirements, they make a decision to integrate Eaton's products into healthcare facilities.
Procurement	Complex procurement processes, often involving compliance documentation, are managed to acquire Eaton's products.
Installation and Integration	Eaton's solutions are installed in healthcare facilities, requiring careful integration with medical equipment.
Patient Safety	Healthcare IT pros prioritize patient safety and rely on Eaton's products to maintain power quality.
Ongoing Compliance and Support	They engage in ongoing compliance checks and utilize Eaton's support services to ensure uninterrupted power in healthcare environments.

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Persona: Healthcare (Template)

Personal

Name:
Consulting Charles
Age: 45-55
Job Titles:
Director of Engineering, Senior Electrical Eng, Head of Data Centre Design

Education: University
BSc, MSc, PhD, IEEE, Association

Social Network: LinkedIn

Communication method: phone, email, face to face.

Company size: Typical 50-200
Exceptions 5-10, 1-5k

Info sources: Journals, Associations, Webinars, Conferences, Vendors, CPD content

Reports to: Technical Director, BoD

Knowledge

Depth & breadth of Engineering Skills. Reality is more hit & miss.

System Design, Elec, Controls, HVAC, Regulations, Planning, Standards

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