ASK ANI

Vicky Tran

What is Ask Ani?

A digital data visual assistant that creates on-demand, dynamic visualizations in real time from simple questions utilizing artificial intelligence and natural language processing from data sets, such as cycle times, quarters, partners, employee metrics, and product insight.

Problem

- More efficient way to make different sets of data available.
- Easy and fast method to show our customers visual data of product insights, cycle times, quarters and partners during meetings, conferences, and presentations.

Persona

- Account Managers who want to present to customers and partners
- VP & directors presenting at meetings and conferences
- Any internal employee who are interested in seeing trends / data
  - how well each quarter compares to the last
  - Between regions
  - Between time of sales
  - Etc.

Persona: Cisco Account Manager

- Sells Cisco solutions, products, and services
- Achieve sales targets
- Build strong customer relationships
- Work with partners and others from Cisco to form sales teams to close deals
- Travel to customer sties, partner events, and various public meeting spot

- qualify a lead > manage opportunity > evaluate requirements > prepare and recommend solution > negotiate price > make install plan > get deal/approval assurance > place order > track order > change order > install > return

- Accountable for business growth
- Prospecting for opportunities, planning and collaborating with people of multiple disciplines, coordinating activities and resources for Cisco sales team, creating business reports, developing and delivering sales presentations, educating and sharing best practices with customers and partners to develop strong relationships, analyzing commissions

Persona: Account Manager

- Commercial AM: manages 30-400 small customer accounts, managing and leveraging/delegating to resources is crucial, knowledge spans many companies and topics, much business is ‘partner led’ meaning it is generated and booked through a partner – the commercial AM looks to partner AM to drive opportunities

- Enterprise AM: manages 1-8 large customer accounts, deals with a small volume of large transactions, business is ‘cisco led’ meaning it is generated by cisco – partners are still needed on the sales team, however, it is likely there will be more cisco resources on the sales team than the partners – enterprise AM typically drives the opportunity while keeping partners involved as appropriate, spends more time on account planning than on opportunity planning

Persona: Cisco Service Account Manager

- Identify and close as many new service sales opportunities as possible within an assigned sales territory
- Drives and motivates the Cisco Account Managers to sell service with all new product sales
- Collaborates with Cisco Inside Service Sales Team to ensure that all service renewals are addressed and closed on time with all possible up-sell and additions attempted
- Perform the roles of sales person, consultant, and service sme

- Qualify lead > manage opportunity > evaluate requirements > prepare and recommend solution > negotiate price > negotiate legal contract > get deal approval/assurance > place order > track order; throughout all – deals with renewals and contract management

- Service sales quota is typically much larger than the product and service quote of an individual Cisco Account Manager because one SAM will be covering the territory of many Account Managers
  - located in the field
  - Variations
- Enterprise SAM and Service Provider SAM: assigned to either a geographic region or a few large accounts
- Commercial SAM: assigned to a geographic region made up of small to medium sized customers, SAMs are not partnered with a Cisco Inside Sales Rep in which they must perform all renewal activities themselves
- Associate SAM: junior SAMs that are typically assigned one sales territory, many are former Cisco inside sales reps and so have extensive quoting tool expertise
- Channel SAM: assigned to Cisco's 1 tier and 2 tier partners to make sure these partners have everything they need to perform the service sales function, greater focus on training on our tools and programs, will mainly help when needed on large orders, service contract center experts

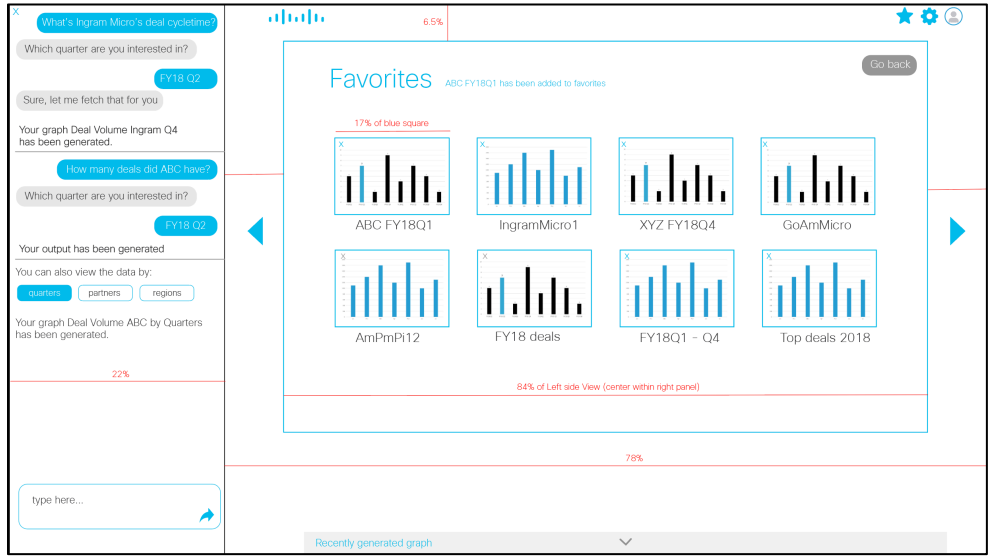
Design Constraints

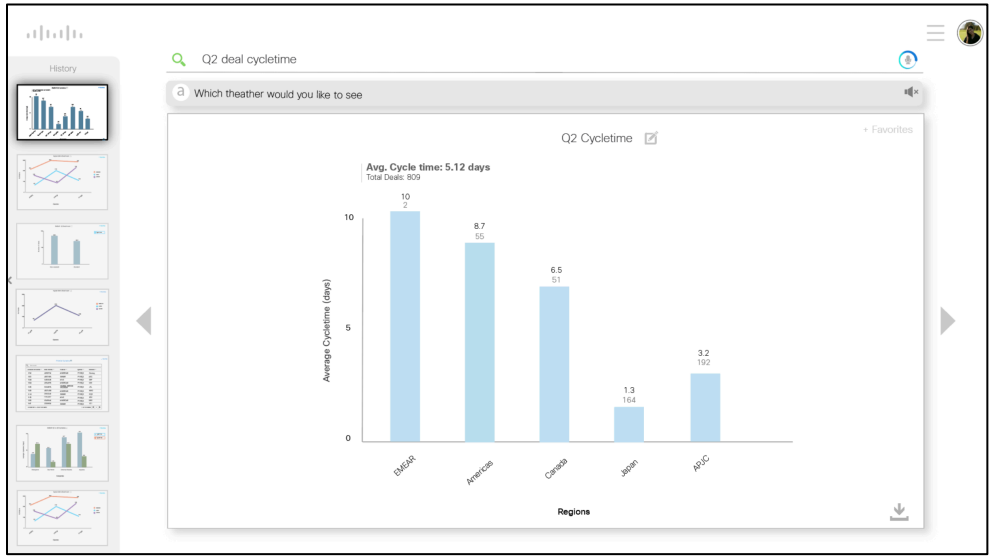
- Teaching the Ani every possible word combination
- Wider range of types of data

Solutions

Create tool that can analyze and display data that allows user to save and interact with the data from our CRM database.

Design a tool that allow users to generate visual charts, manipulate, save, customize, and interact with. we created a toll that had voice recognition that displays data in a variety of ways that users can customize, download, and share.





User Testing

- Cisco Account Managers & Other Internal Users
  - Tasks to complete
    - Display Q1 vs Q2 sales in the AMERICAS
      - Now change it to display APJAC
      - Change it to display only Q3 in APJAC
    - Download and Save a graph and raw data
    - Favorite a view
    - Re-open existing graph
    - Locate recently produced visual
    - Change the type of graph being displayed
    - Change the color scheme
    - Mute Ask Ani

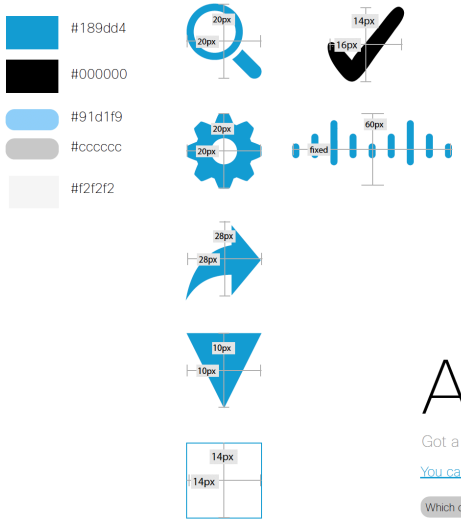
- How long did it take you to complete each task
  - Number of clicks
  - Time
- Were you unable to perform a task or find what you were looking for? Which task was it?
- Ease of use 1-5?
- Were you satisfied with the types of graph it displayed?
- How often do you use Ask Ani ?
- When do they use Ask Ani?
- What feature do they want to see?
- What feature do they find most beneficial?
- Additional Feedback?

Results

Ask Ani is currently being used by over 200 active users at Cisco during meetings, conferences and presentations. Reduced time spent on gathering data and producing visualization significantly.

Designing Ask Ani

Components

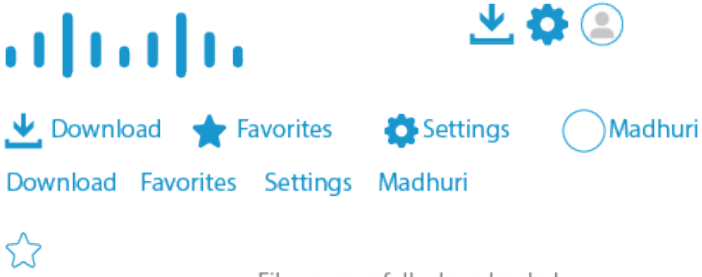


Ask Ani 100pt Cisco Sans Thin

Got a question on 21pt Cisco Sans Thin

You can ask me: What is 18pt Cisco Sans Thin

Which quarter are you interested in? 14pt Cisco Sans Thin



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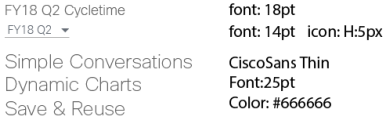

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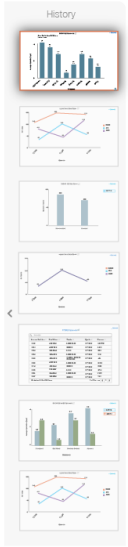

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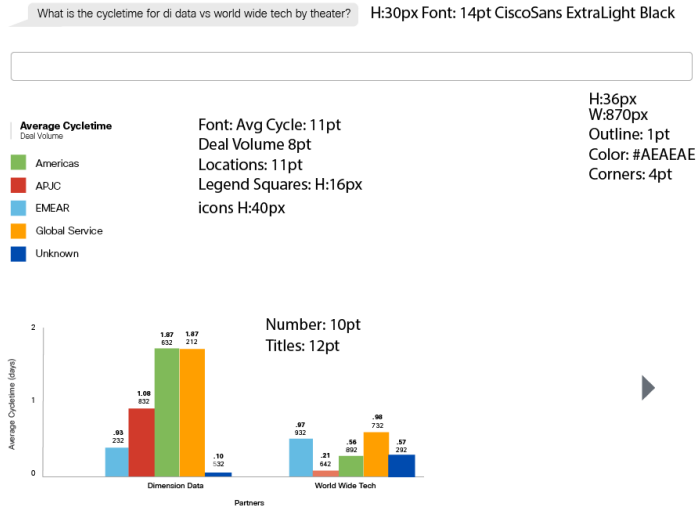

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Deal Volume 8pt
Locations: 11pt
Legend Squares: H:16px
icons H:40px

H:36px
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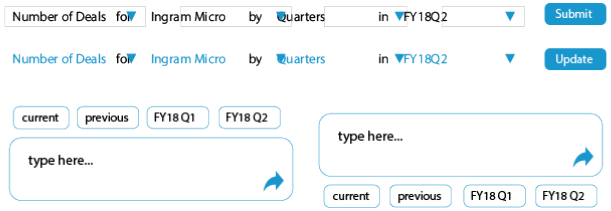
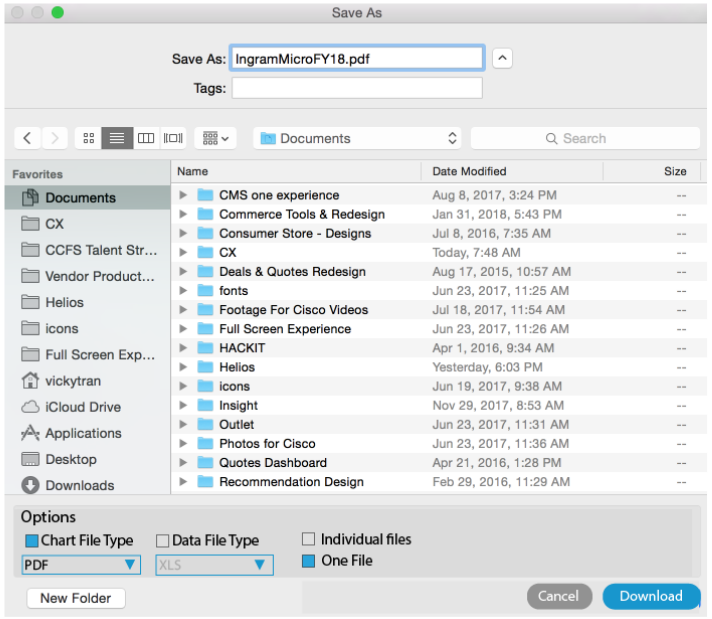

Number of Deals for Ingram Micro by Quarters in FY18Q2
Submit
Number of Deals for Ingram Micro by Quarters in FY18Q2
Update
current
previous
FY18 Q1
FY18 Q2
type here...
type here...
current
previous
FY18 Q1
FY18 Q2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Favorites
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CX
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Helios
icons
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vickytran
iCloud Drive
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Desktop
Downloads
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Size
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Consumer Store - Designs Jul 8, 2016, 7:35 AM
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Options
Chart File Type
Data File Type
Individual files
One File
PDF
XLS
New Folder
Cancel
Download

Ask Ani
+ Add to Favorites
- Cycletime by Program FY18Q1
- Deal Volume by Theater
- Ingram Micro Cycletime FY18Q2
- Cycletime by Program FY18Q3
- Deal Volume by Theater
- Ingram Micro Cycletime FY17Q4
- Cycletime by Program FY17
- Deal Volume by Theater
- Ingram Micro Cycletime FY16Q4
- Cycletime by Program FY15
- Deal Volume by Theater
- Remove from Favorites
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- Deal Volume by Theater
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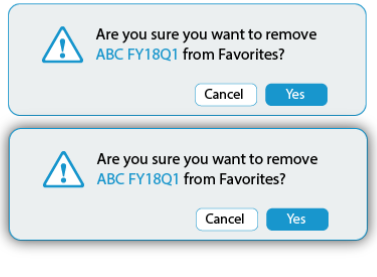
- Cycletime by Program FY15
- Deal Volume by Theater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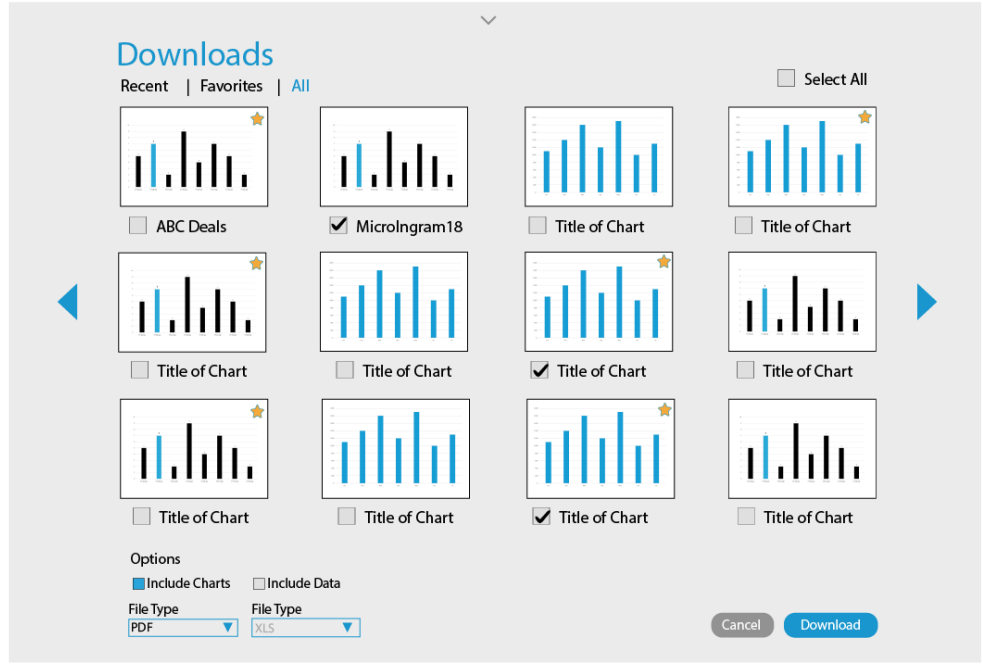
Are you sure you want to remove ABC FY18Q1 from Favorites?
Cancel
Yes
Download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Recent | Favorites | All
Select All
ABC Deals
MicroIngram18
Title of Chart
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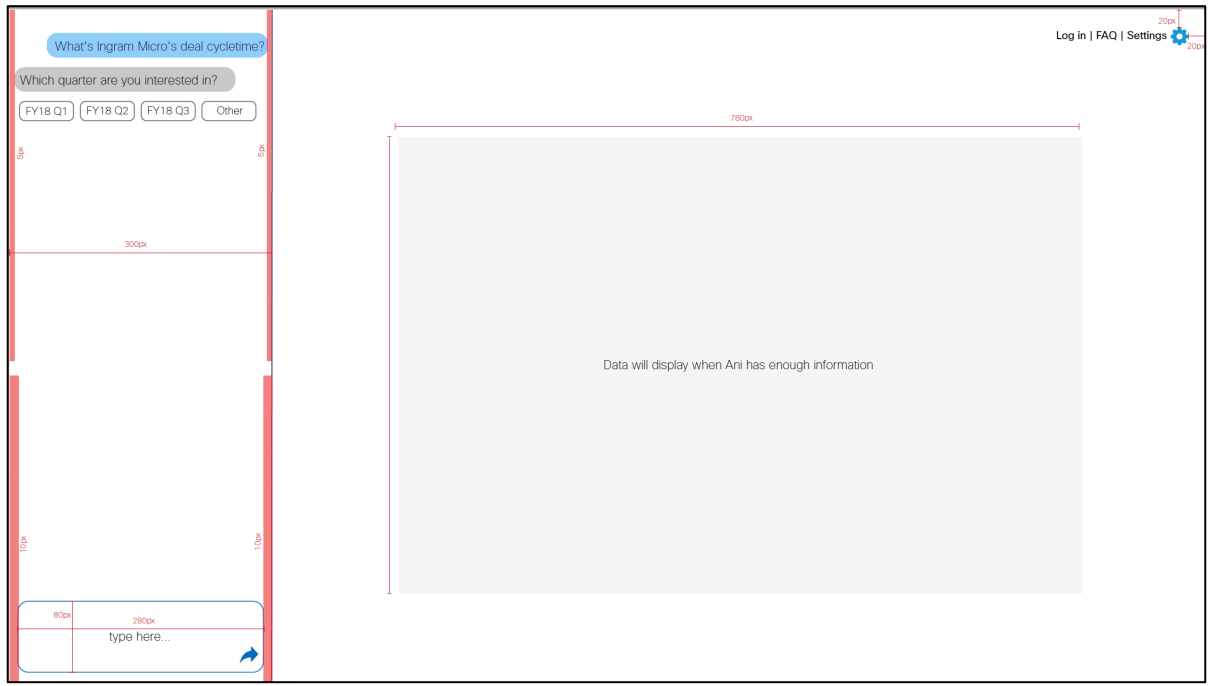
What's Ingram Micro's deal cycletime?
Which quarter are you interested in?
FY18 Q1
FY18 Q2
FY18 Q3
Other
5px
5px
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10px
80px
280px
type here...
Log in | FAQ | Settings
20px
20px
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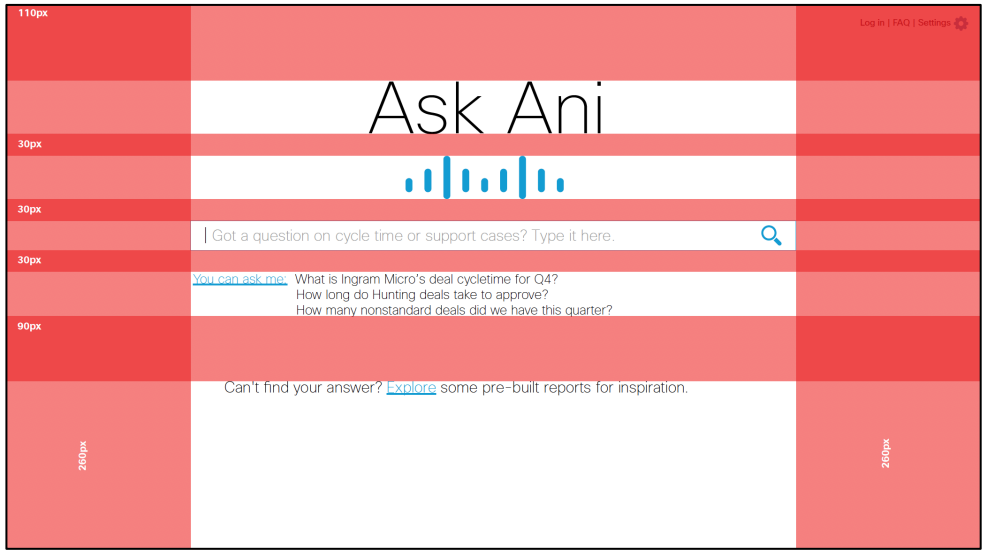
Data will display when Ani has enough information


110px
Log in | FAQ | Settings
Ask Ani
30px
30px
Got a question on cycle time or support cases? Type it here.
30px
You can ask me:
What is Ingram Micro's deal cycletime for Q4?
How long do Hunting deals take to approve?
How many nonstandard deals did we have this quarter?
90px
Can't find your answer? Explore some pre-built reports for inspiration.
260px
260px

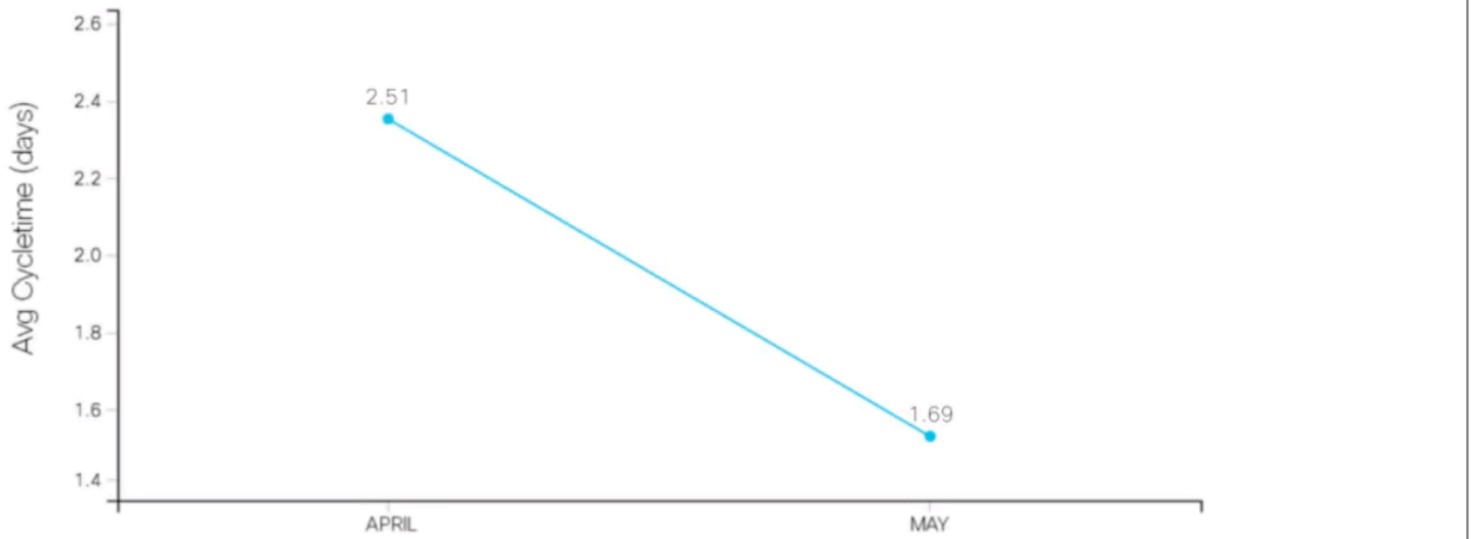
youtube.com/watch?v=f19VfyLbbHE https://www.youtube.com/watch?v=f19VfyLbbHE

Apps BIGIP 2 JIRA BOARD Designs Muon - Agile Boar... F5 BIG-IP UDF f5 outlook DOS Track it hive B Gdrive Bugzilla Main Page video manager

YouTube vicky tran cisco live

History

Compare



1:03 / 2:03

Ask Ani

You can ask me: What is Ingram Micro's deal cycletime for Q4?
How long do Hunting deals take to approve?
How many nonstandard deals did we have this quarter?

Explore some pre-built reports for inspiration.

Ask Ani

Simple Conversations

Dynamic Charts

Save & Reuse

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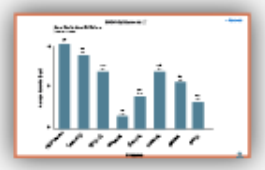
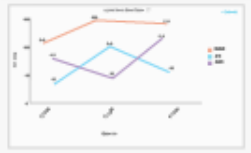
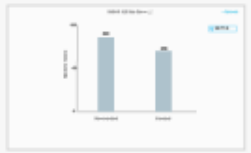
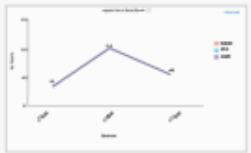
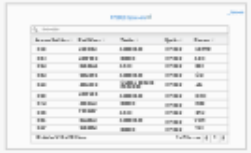
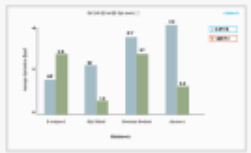
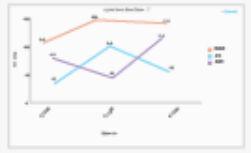
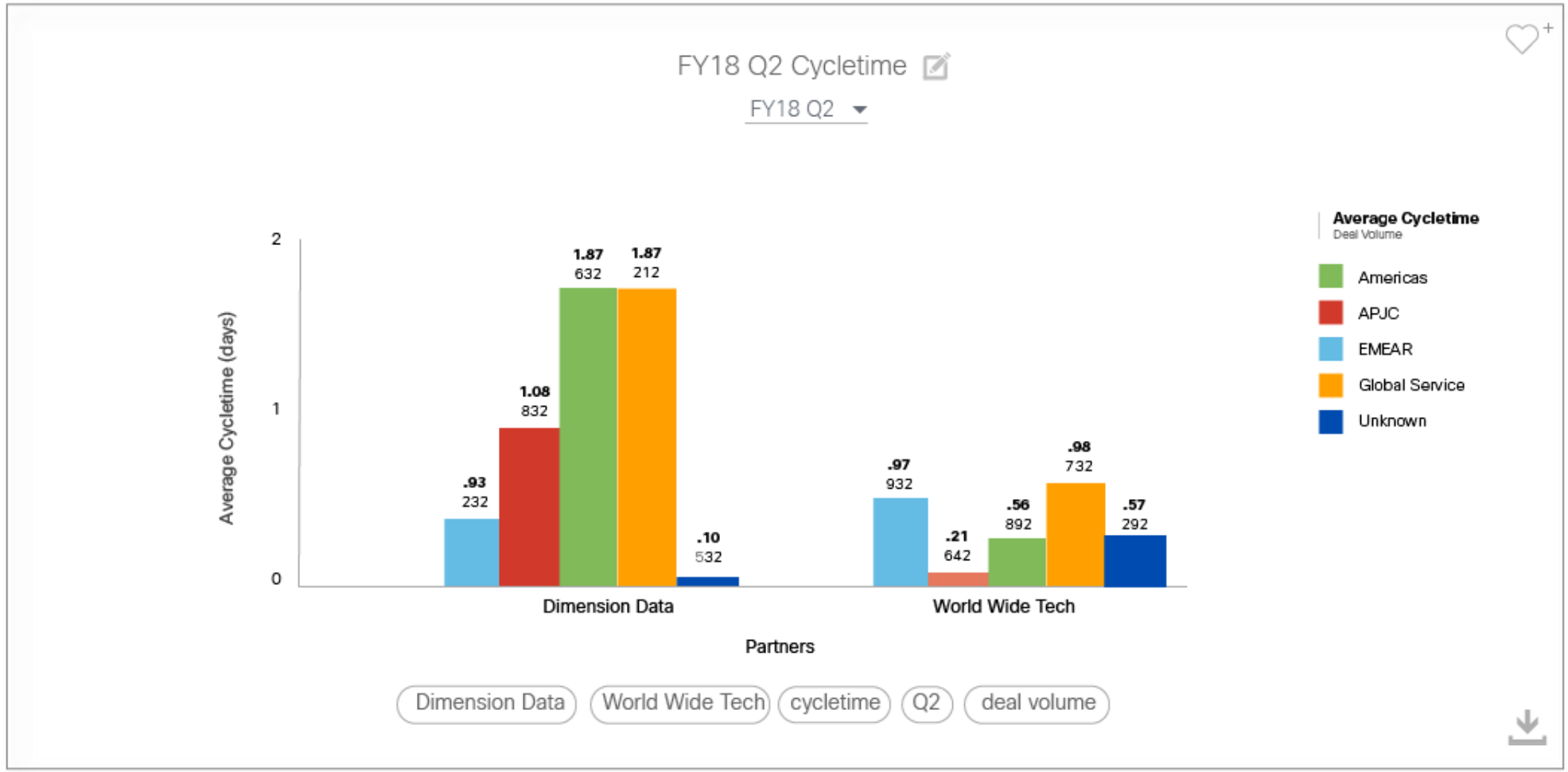
History

Q2!

What is the average cycletime for Di Data and World Wide Tech? VT

For what quarter?



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Profile Details

Vicky Tran
UX Designer

Vicky
First Name

Tran
Last Name

Vicky
Preferred Name

Save Changes Cancel

Access Level Individual

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Setting Preferences

Color Scheme

Audio

on

Language

English

Voice

male

British

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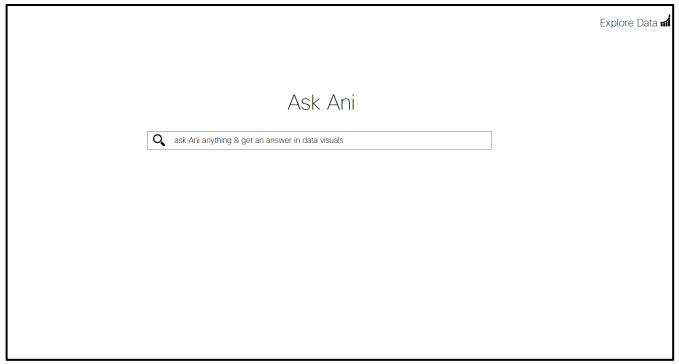
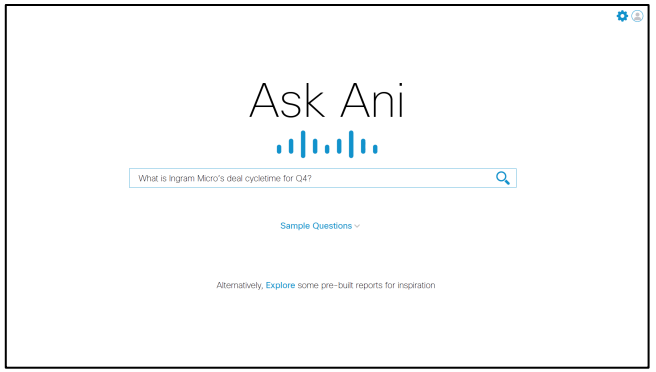
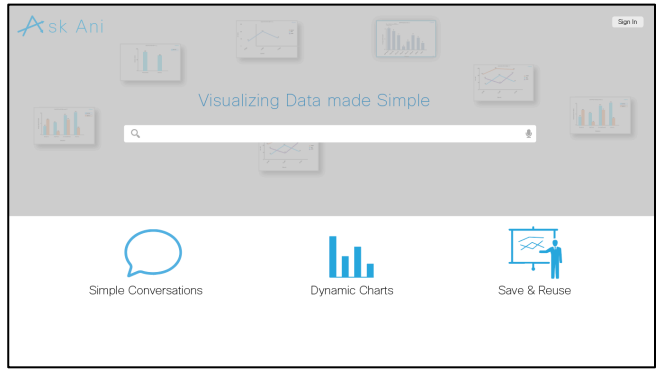
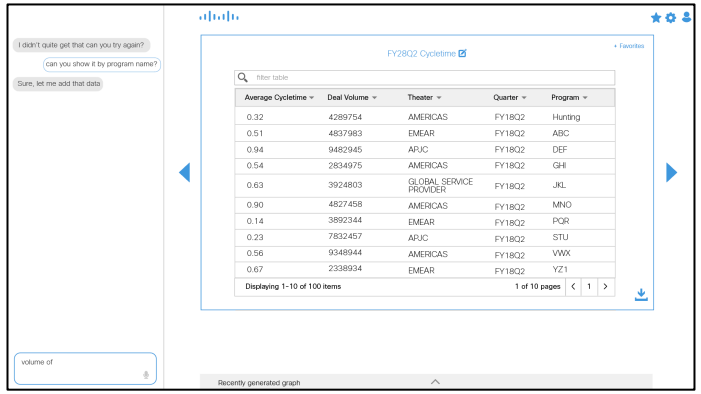
Landing Page Evolution

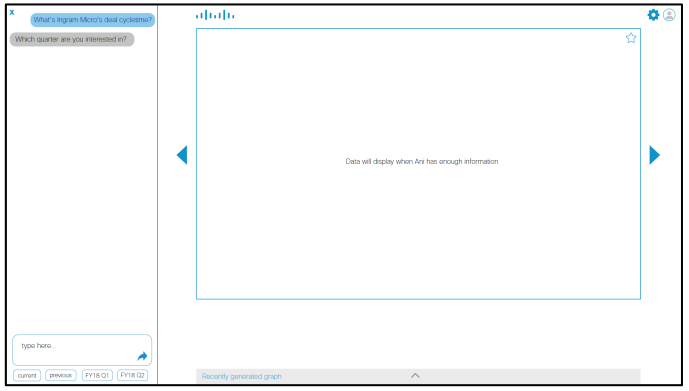


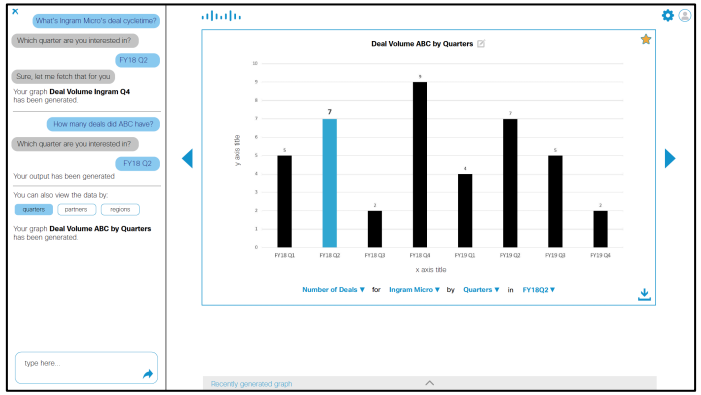


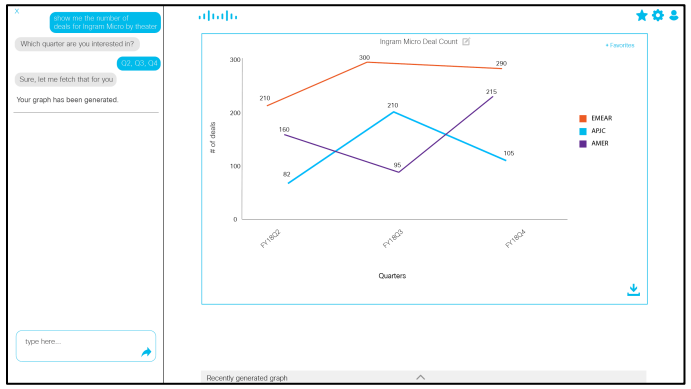


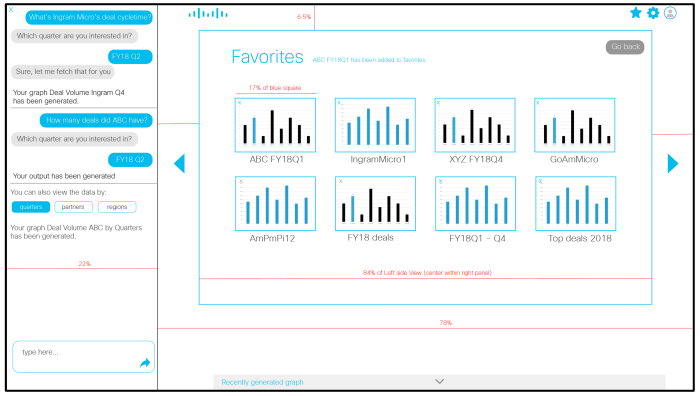
Ask Ani Chat Evolution

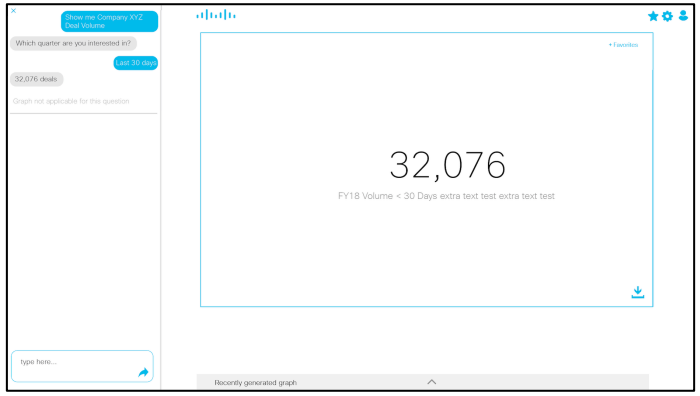




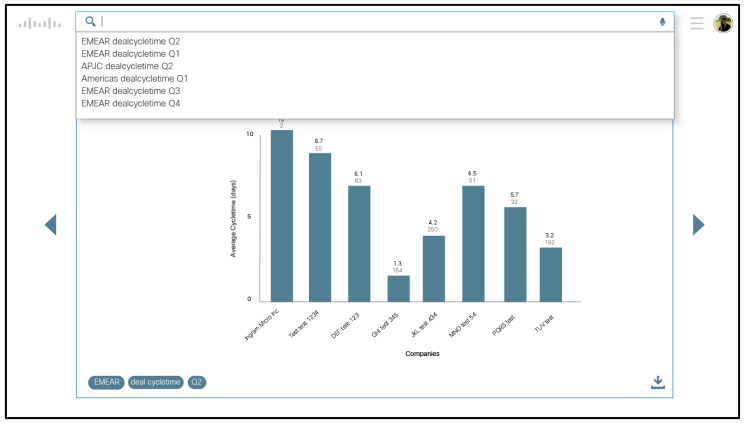


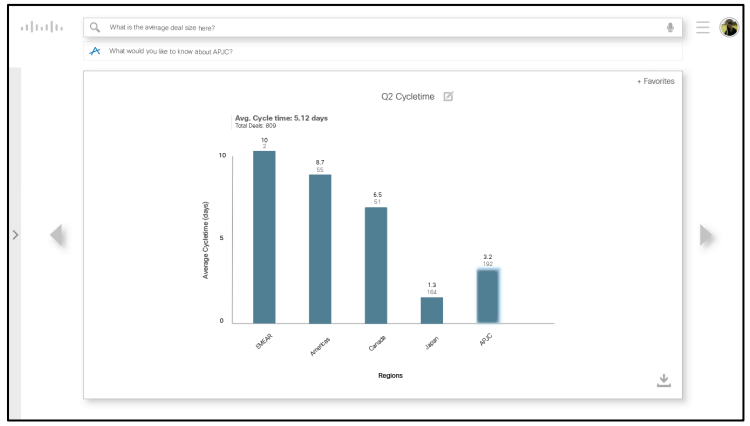


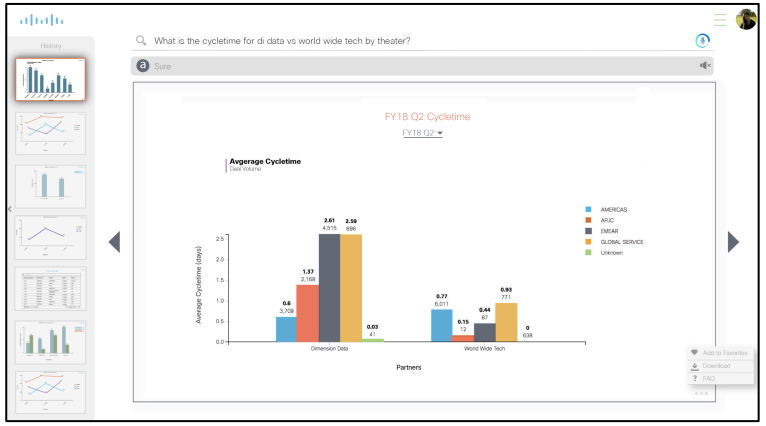


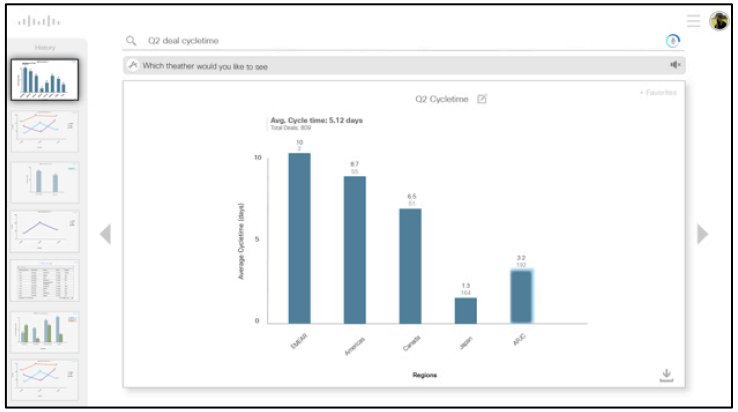


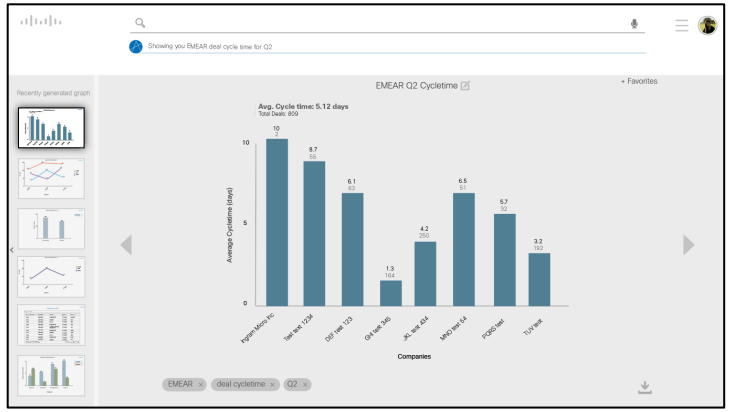
Ask Ani Search Evolution

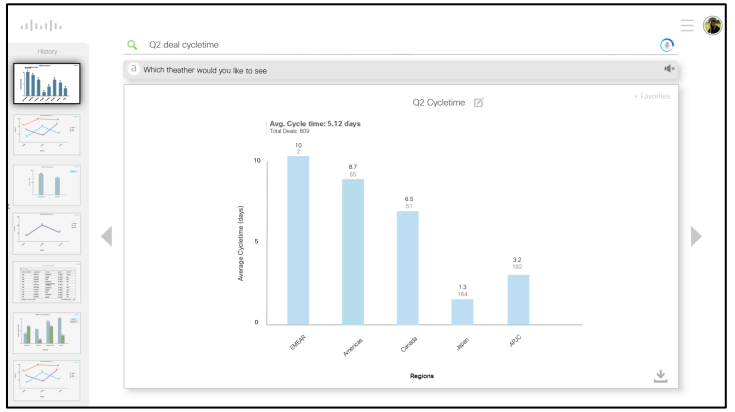






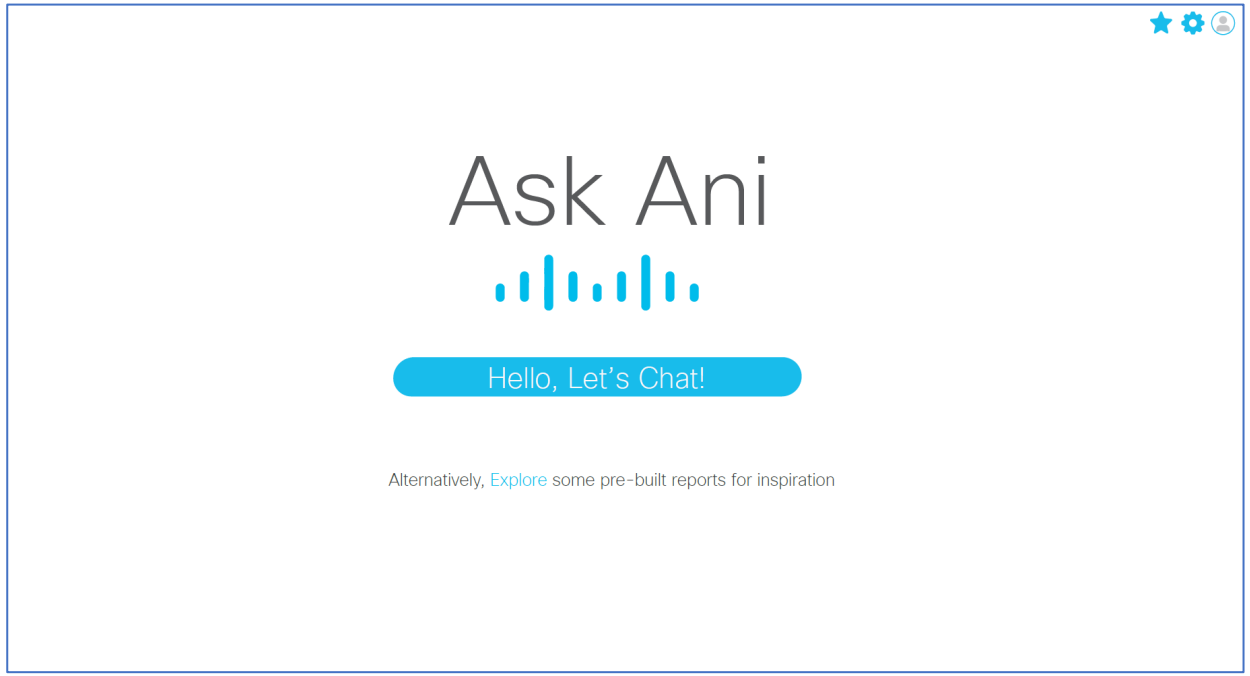






Welcome Screen

The Design

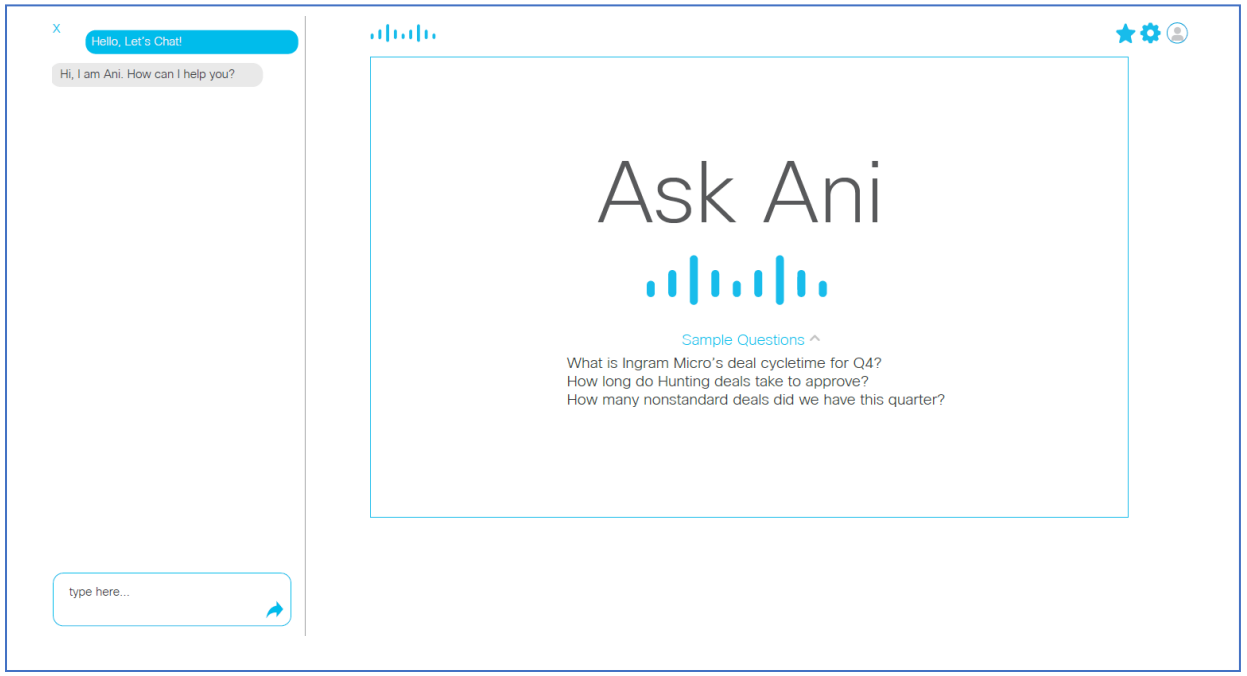


The Prototype

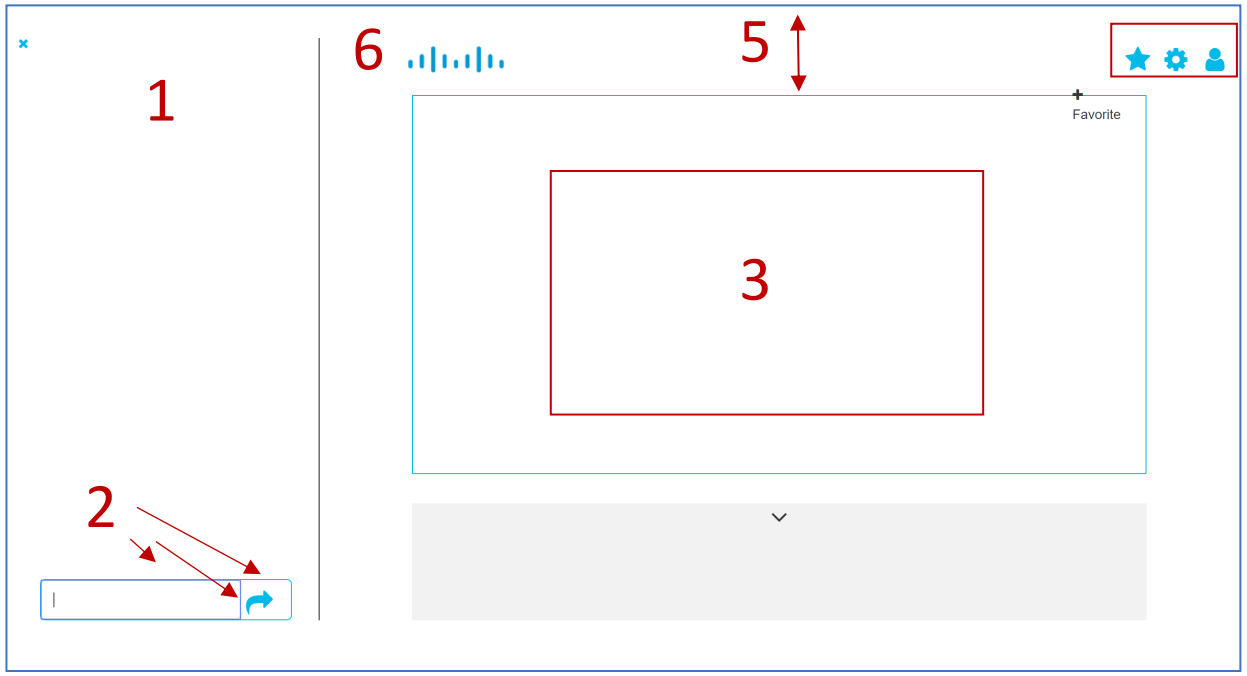
1. Please use the icons we provided and adjust the propositions to make them smaller
2. Increase the spacing between the elements to reflect proportions in the design
3. Change the button's proportions to reflect the design
4. Change the color of logo to the color of the button

Welcome Screen

The Design

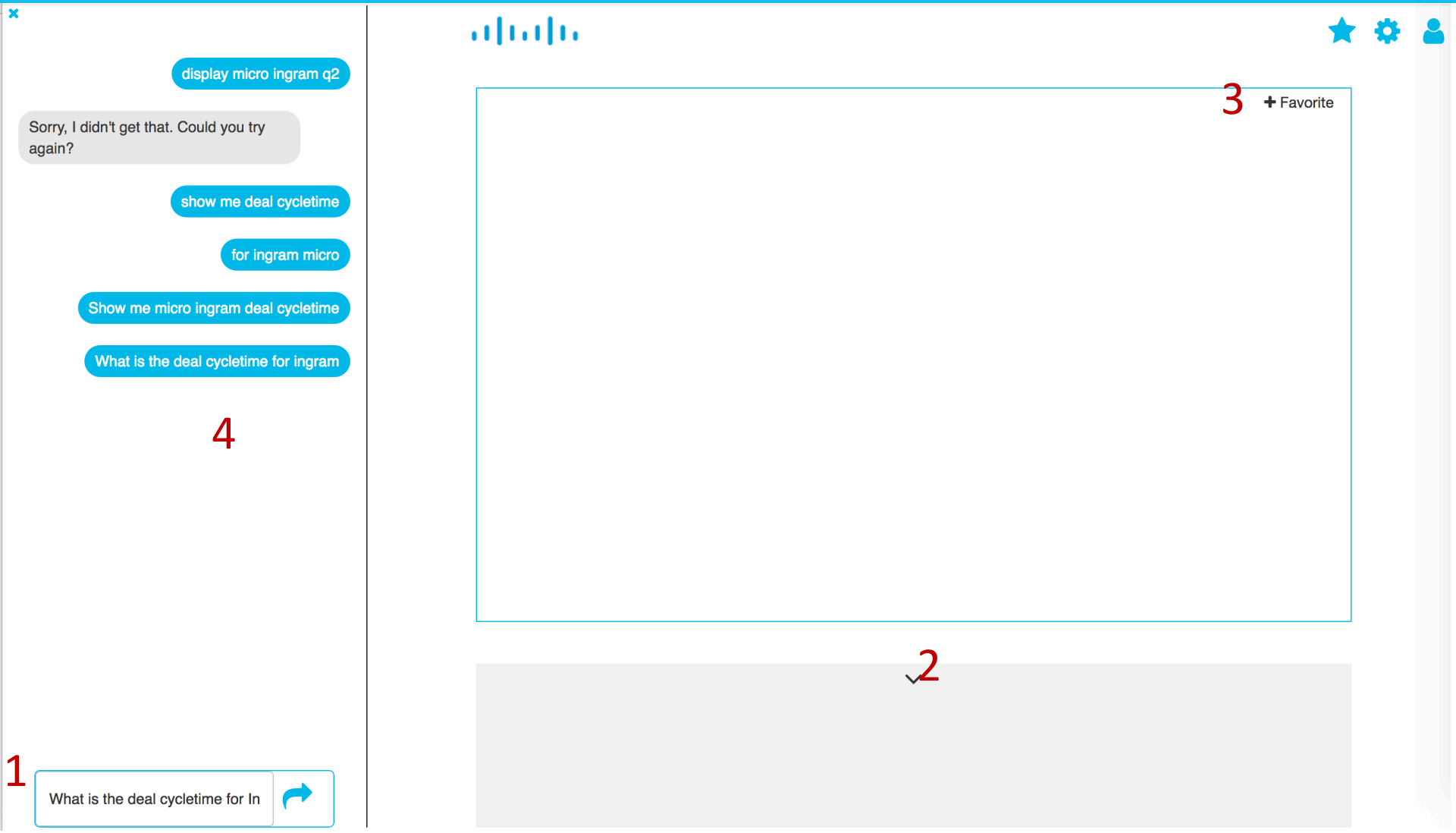


The Prototype



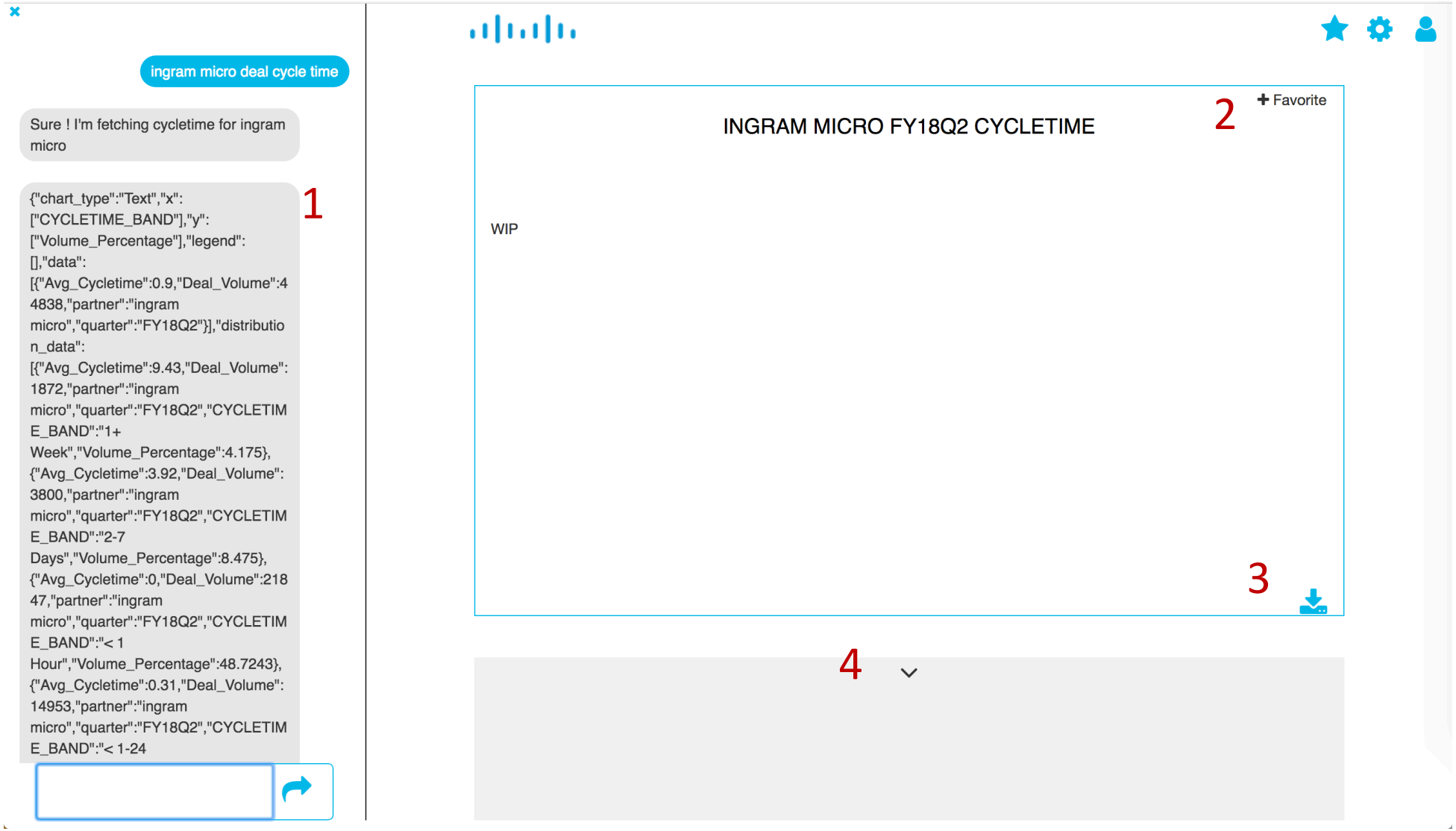
1. We need to display the user's greeting and Ani's reply
2. The message box needs to reflect the design. "Type here" text, size, and format
3. We need to display all the Landing elements included in the design
4. Adjust the proportions to reflect the design
5. Adjust the color and the proportions of the logo

Welcome Screen



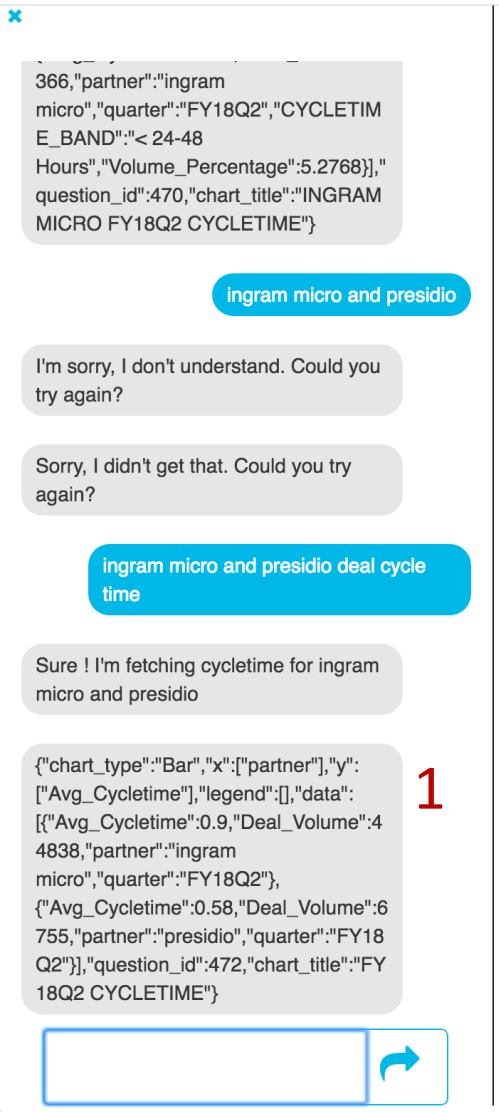
1. Can this be text wrap so there is at least 2-3 lines instead of making the beginning of the text disappear.
2. Element not yet needed. The default should be minimized until there is content
3. Disabled when not needed [gray out]
4. Loading progress icon needed OR a respond after each submit

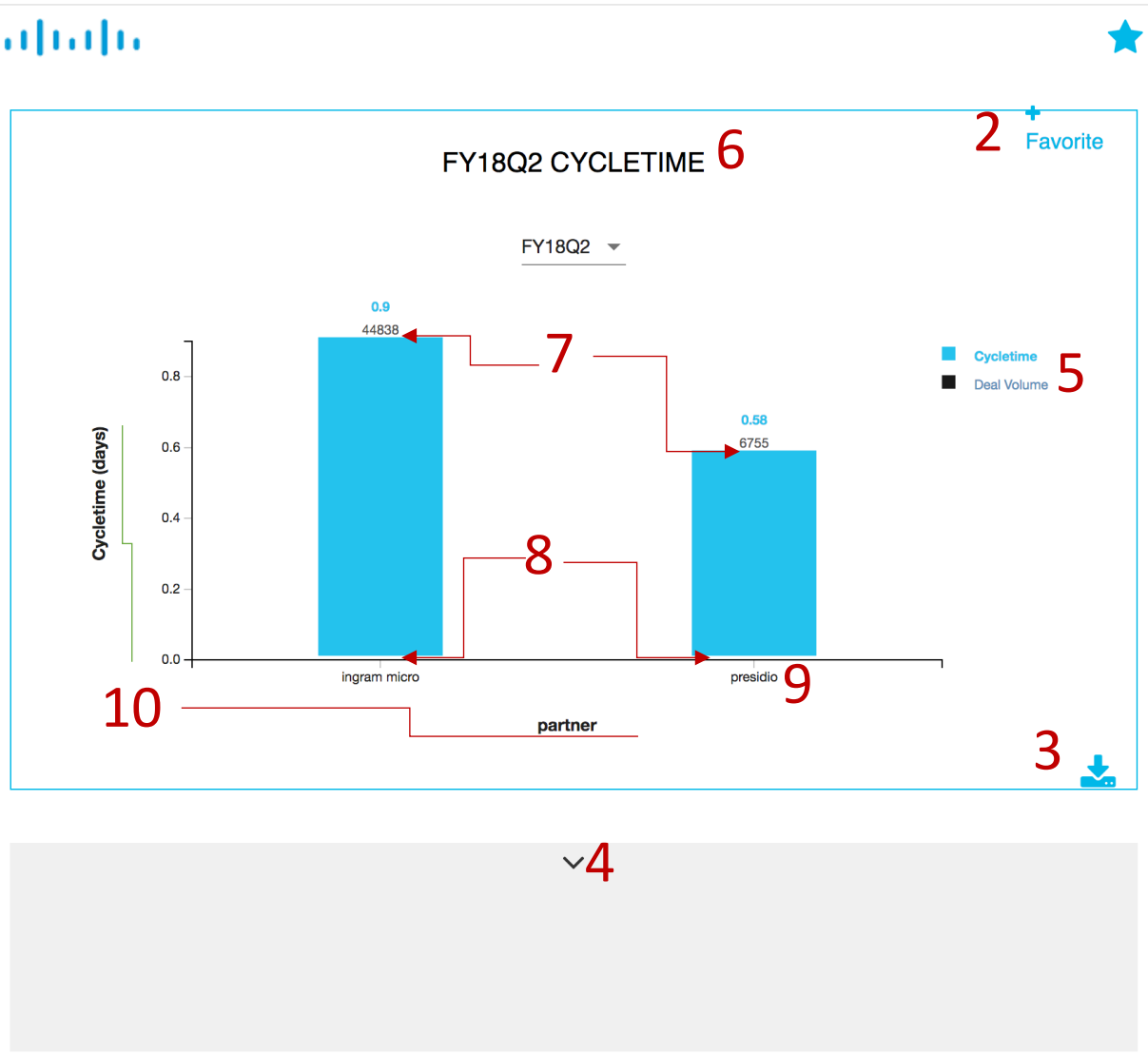
Graph



1. This text should not be displayed. Alternatively it should ask for another partner or tell user they need more information.
2. Inconsistency, notice black colored and inline +Favorite where as the next slide it is blue and not aligned
3. The download button needs to have white space below it
4. Again, items without content should default collapsed and hidden

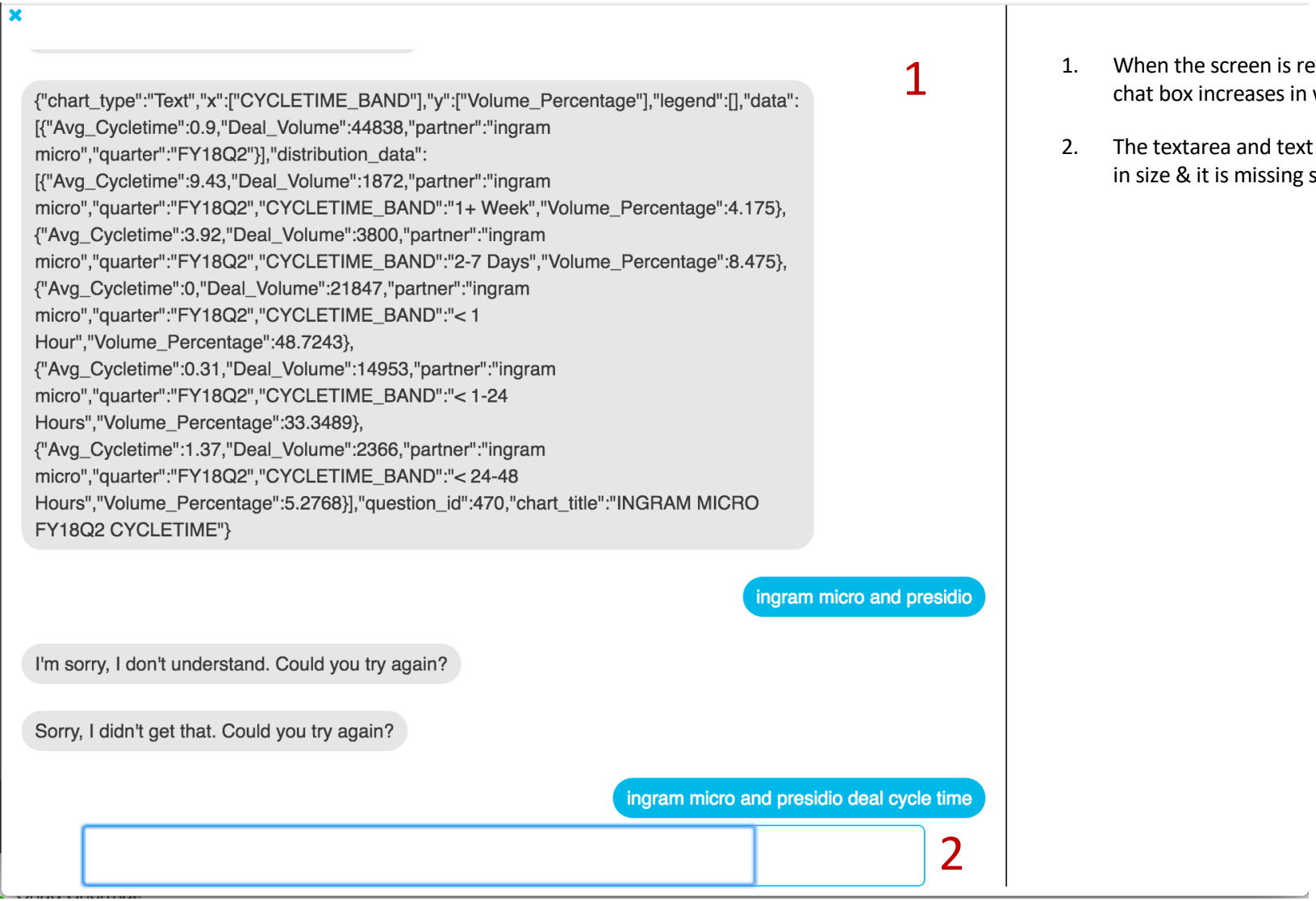
Graph





1. This text should not be displayed.
2. Inconsistency, notice +Favorite is blue and not aligned where as the previous slide black colored inline. [it needs to be inline]
3. The download button needs to have white space below it
4. Again, items without content should default collapsed and hidden. Add the label “recently generated graphs”
5. Font is dark blue where as label and box looks black [no need to introduce new shade of blue]
6. Allow user to edit title
7. Add 5+ pixels between Deal Volume label and Bar
8. Blue bar needs to touch the axis
9. Capitalize Company names
10. Consistency in labelling axis. Capitalized or not

Design



1. When the screen is reduced in size the chat box increases in width
2. The textarea and text box do not match in size & it is missing submit arrow

Graph Design

X

Show me Ingram micro's distribution of cycle time

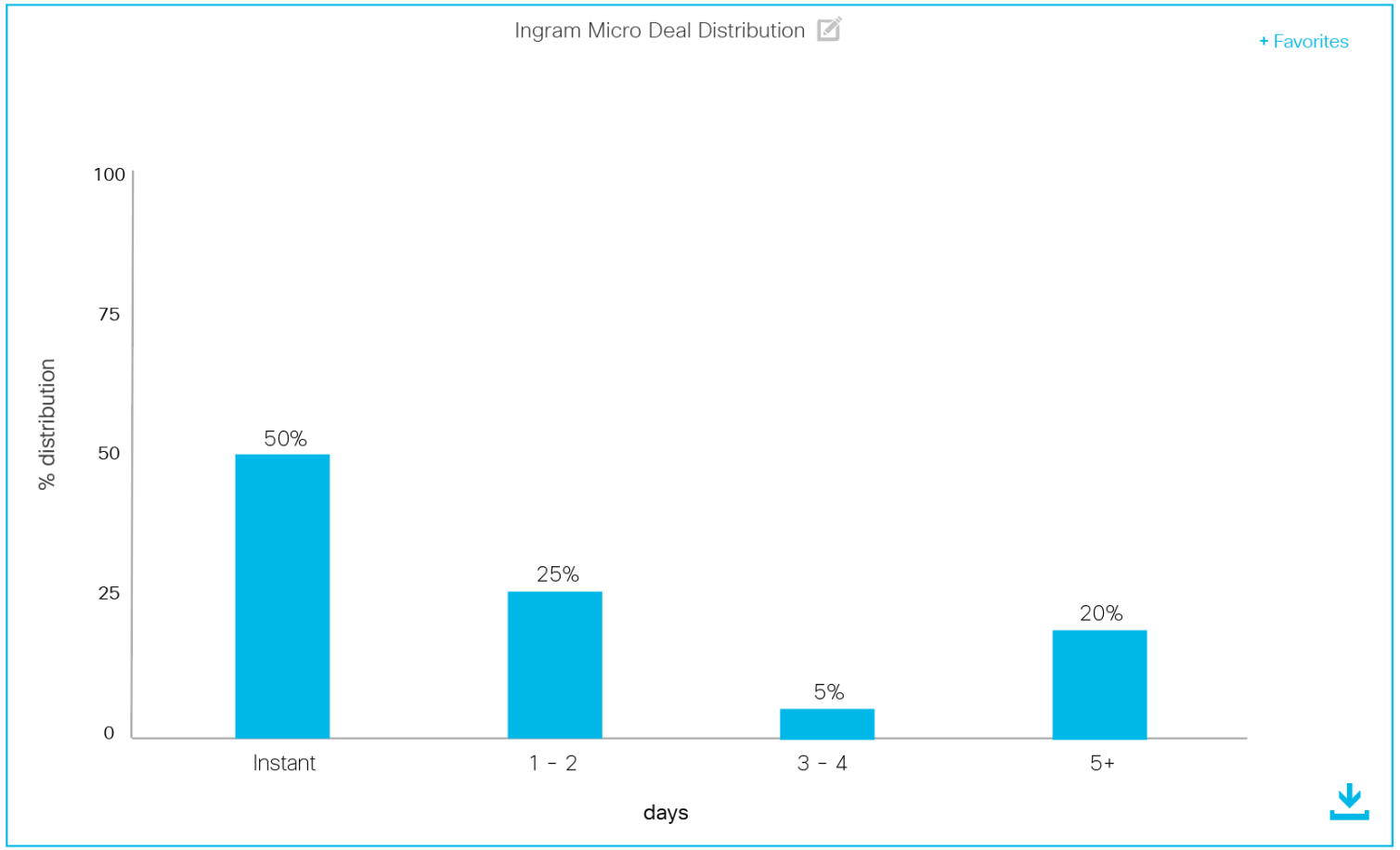
Which quarter are you interested in?

Q2, Q3, Q4

Sure, let me fetch that for you

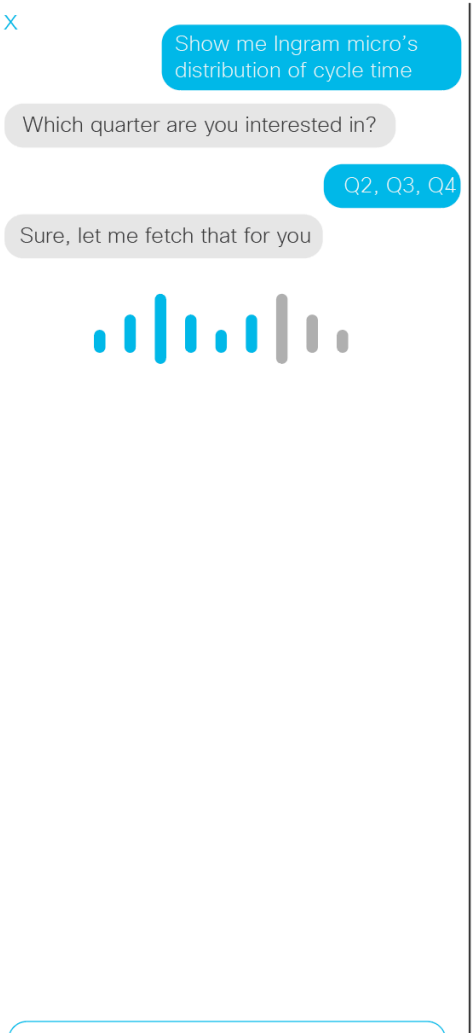
Your graph has been generated.

type here...



Recently generated graph

For Later



1. Loading icons
2. Textbox

Ask Ani

Sample Questions

What is Ingram Micro's deal cycletime for Q4?
How long do Hunting deals take to approve?
How many nonstandard deals did we have this quarter?

Alternatively, Explore some pre-built reports for inspiration

Ask Ani

What is Ingram Micro's deal cycletime for Q4?

Sample Questions

Alternatively, Explore some pre-built reports for inspiration

x

What's Ingram Micro's deal cycletime?

Which quarter are you interested in?

type here...

current | previous | FY18 Q1 | FY18 Q2

Data will display when Ani has enough information

Recently generated graph

x

What's Ingram Micro's deal cycletime?

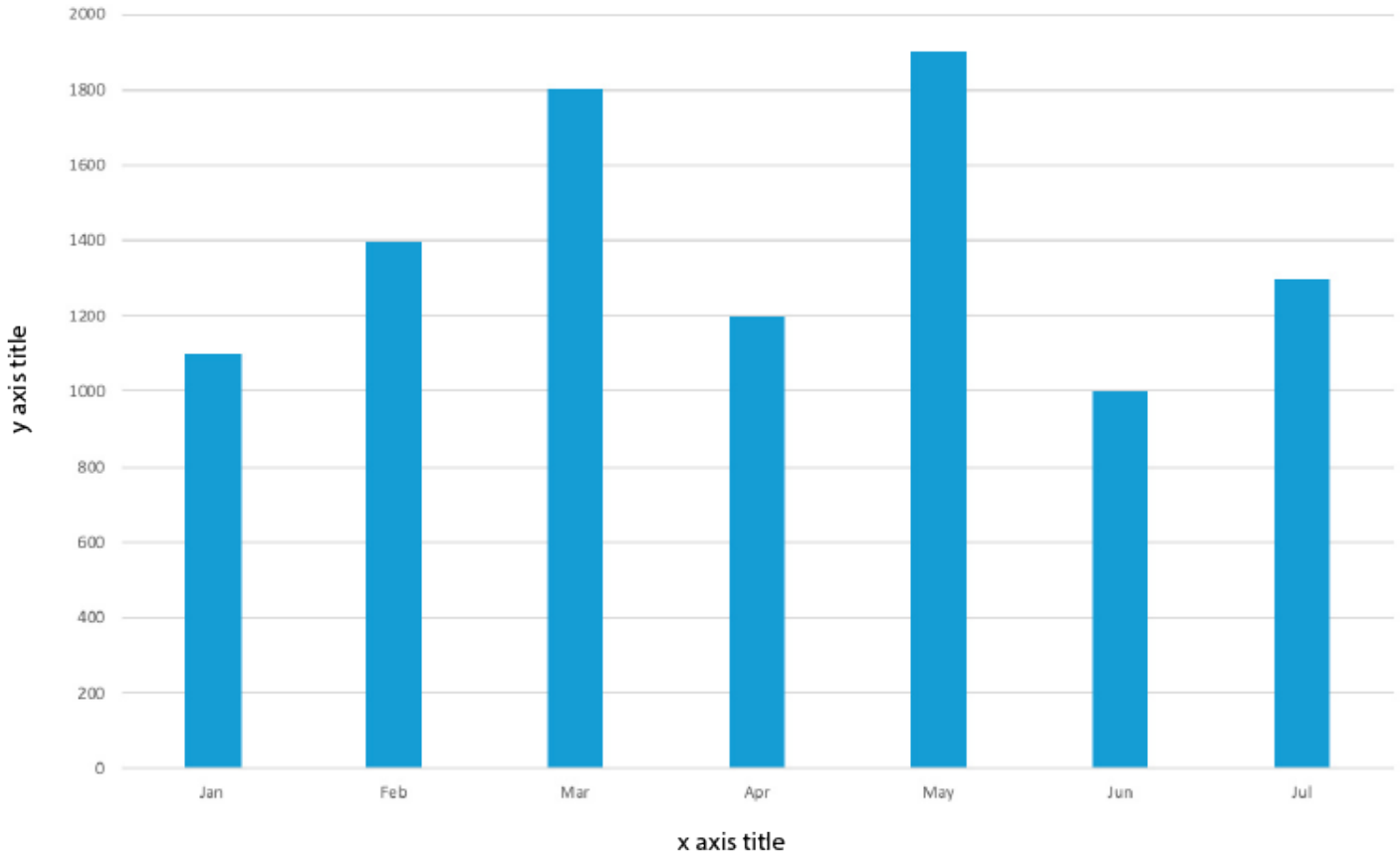
Which quarter are you interested in?

FY18 Q2

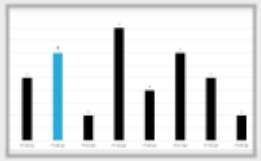
Sure, let me fetch that for you

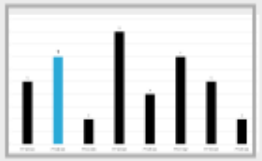
Your graph Deal Volume Ingram Q4 has been generated.

How many deals did ABC have?

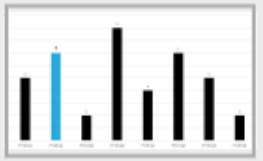


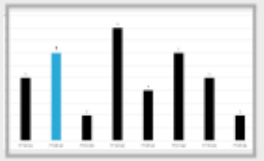
Recently generated graph


Tittle of Chart


Tittle of Chart

Tittle of Chart


Tittle of Chart


Tittle of Chart

x

What's Ingram Micro's deal cycletime?

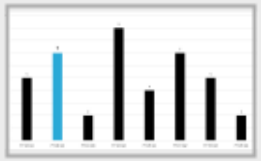
Which quarter are you interested in?

FY18 Q2

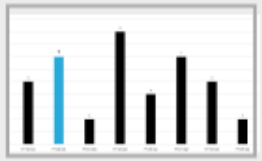
Sure, let me fetch that for you

How many deals did ABC have?

Recently generated graph

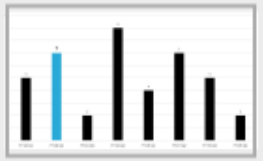


Tittle of Chart

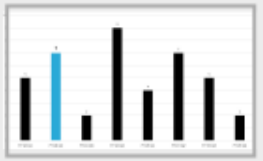


Tittle of Chart

Tittle of Chart



Tittle of Chart



Tittle of Chart

x

What's Ingram Micro's deal cycletime?

Which quarter are you interested in?

FY18 Q2

Sure, let me fetch that for you

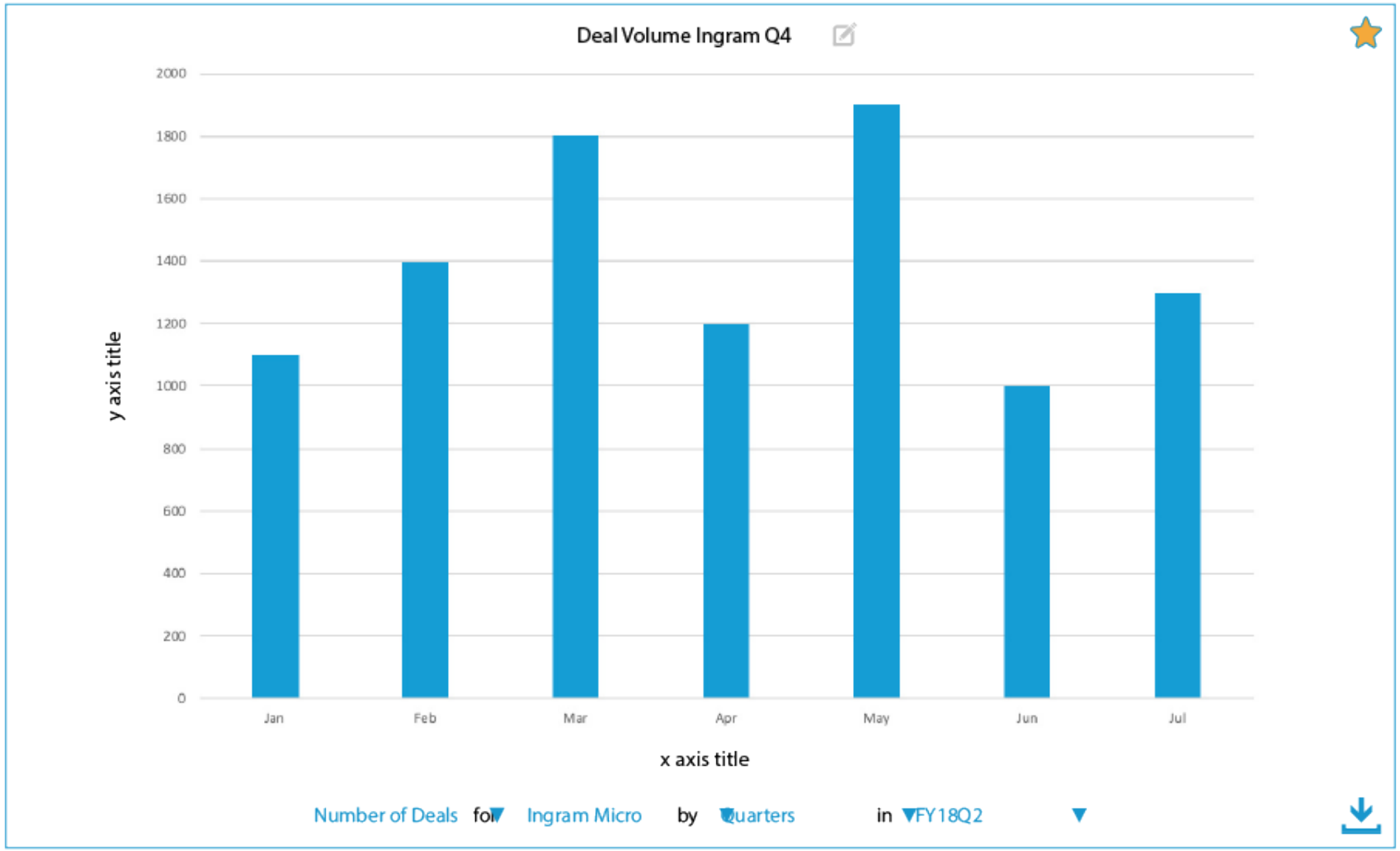
Your graph Deal Volume Ingram Q4 has been generated.

How many deals did ABC have?

Which quarter are you interested in?

type here...

current | previous | FY18 Q1 | FY18 Q2



Recently generated graph

x

What's Ingram Micro's deal cycletime?

Which quarter are you interested in?

FY18 Q2

Sure, let me fetch that for you

Your graph Deal Volume Ingram Q4 has been generated.

How many deals did ABC have?

Which quarter are you interested in?

FY18 Q2

Your output has been generated

You can also view the data by:

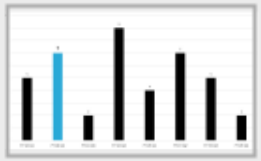
quarters | partners | regions

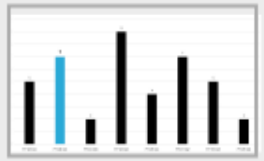
type here...

80,023

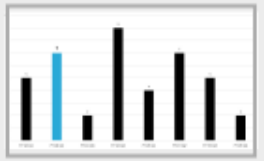
deals for Ingram Micro FY18 Q2

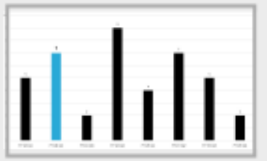
Recently generated graph


Tittle of Chart


Tittle of Chart

Tittle of Chart


Tittle of Chart


Tittle of Chart

What's Ingram Micro's deal cycletime?

Which quarter are you interested in?

FY18 Q2

Sure, let me fetch that for you

Your graph Deal Volume Ingram Q4 has been generated.

How many deals did ABC have?

Which quarter are you interested in?

FY18 Q2

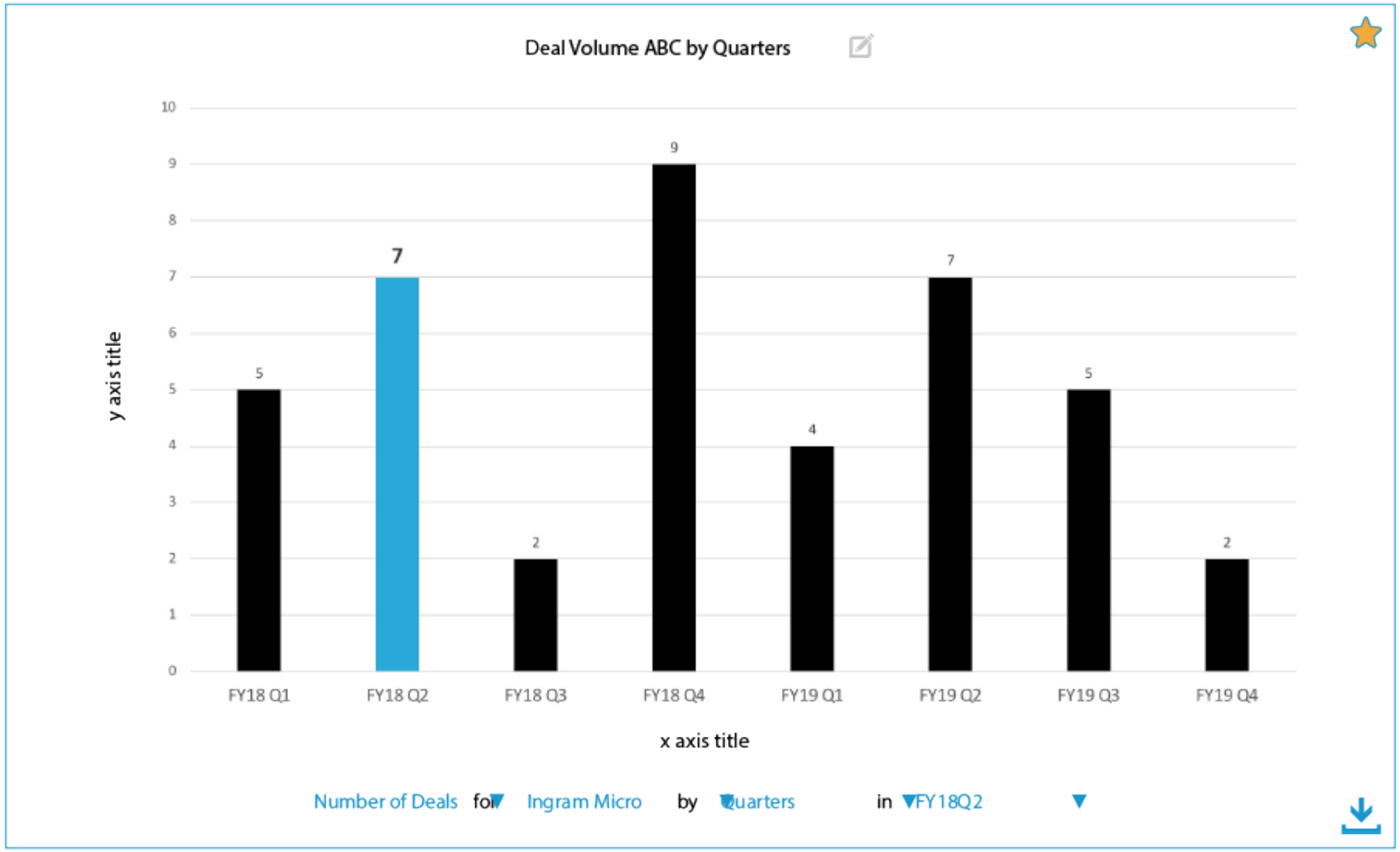
Your output has been generated

You can also view the data by:

quarters | partners | regions

Your graph Deal Volume ABC by Quarters has been generated.

type here...



Recently generated graph

x

What's Ingram Micro's deal cycletime?

Which quarter are you interested in?

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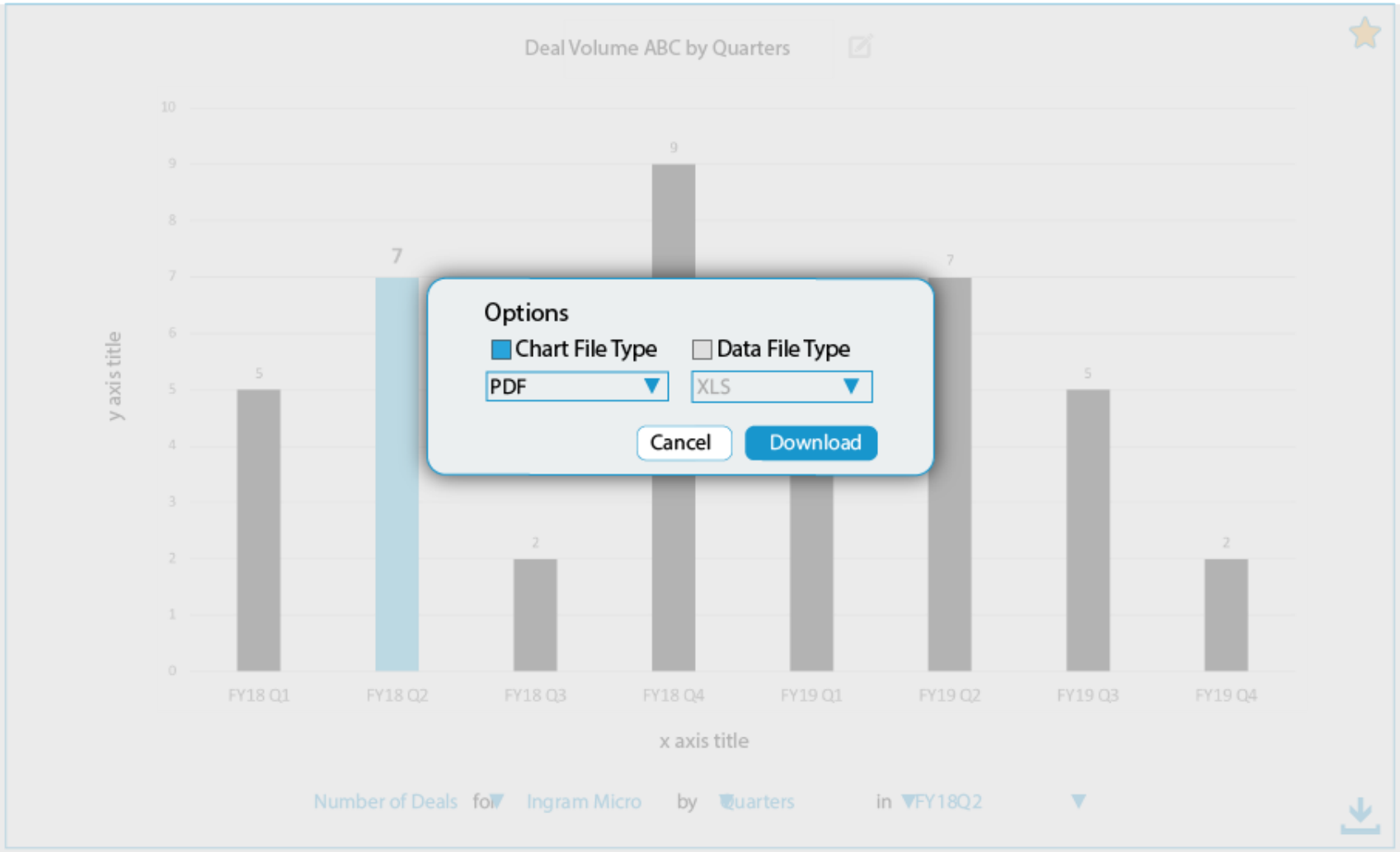


Recently generated graph

x

What's Ingram Micro's deal cycletime?

Which quarter are you interested in?

FY18 Q2

Sure, let me fetch that for you

Your graph Deal Volume Ingram Q4 has been generated.

How many deals did ABC have?

Which quarter are you interested in?

FY18 Q2

Your output has been generated

You can also view the data by:

quarters | partners | regions

Your graph Deal Volume ABC by Quarters has been generated.

type here...

Favorites

ABC FY18Q1

IngramMicro1

XYZ FY18Q4

GoAmMicro

AmPmPi12

FY18 deals

FY18Q1 - Q4

Top deals 2018

Top deals 2018

FY18Q1 - Q4

FY18Q1 - Q4

FY18Q1 - Q4

Are you sure you want to remove ABC FY18Q1 from Favorites?

Cancel | Yes

Cancel

x

What's Ingram Micro's deal cycletime?

Which quarter are you interested in?

FY18 Q2

Sure, let me fetch that for you

Your graph Deal Volume Ingram Q4 has been generated.

How many deals did ABC have?

Which quarter are you interested in?

FY18 Q2

Your output has been generated

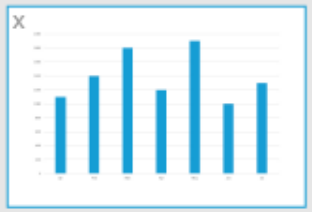
You can also view the data by:

quarters | partners | regions

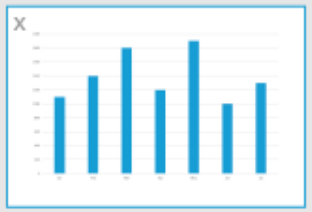
Your graph Deal Volume ABC by Quarters has been generated.

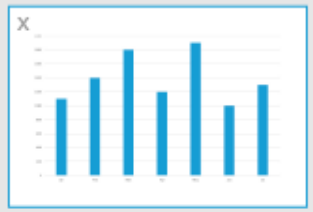
type here...

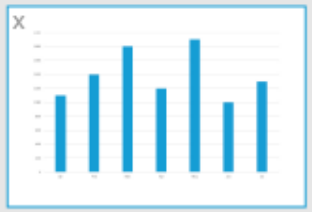
Favorites

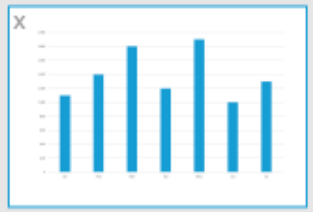

ABC FY18Q1

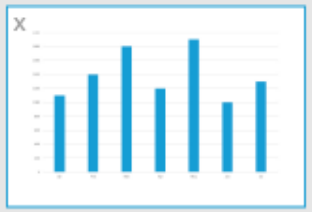
IngramMicro1

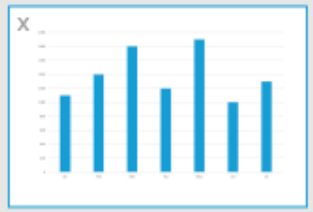

XYZ FY18Q4

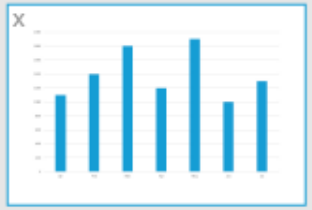

GoAmMicro

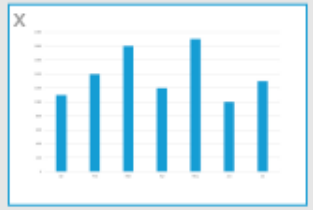

AmPmPi12

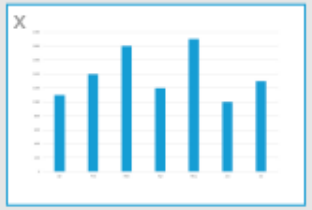

FY18 deals

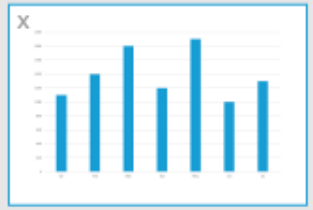

FY18Q1 - Q4


Top deals 2018


Top deals 2018


FY18Q1 - Q4


FY18Q1 - Q4


FY18Q1 - Q4

Cancel

x

What's Ingram Micro's deal cycletime?

Which quarter are you interested in?

FY18 Q2

Sure, let me fetch that for you

Your graph Deal Volume Ingram Q4 has been generated.

How many deals did ABC have?

Which quarter are you interested in?

FY18 Q2

Your output has been generated

You can also view the data by:

quarters | partners | regions

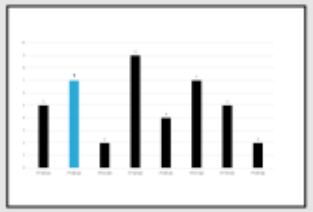
Your graph Deal Volume ABC by Quarters has been generated.

type here...

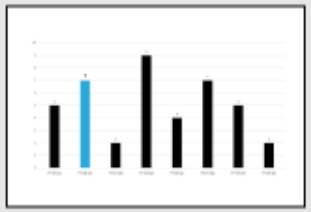
Download

Files successfully downloaded

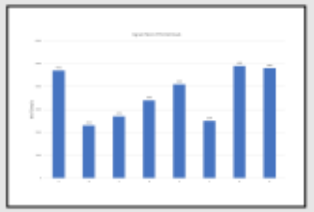
Select All



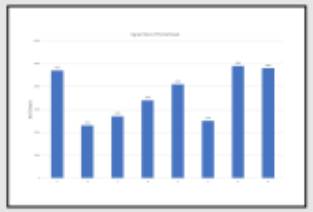
ABC Deals



MicroIngram18



Title of Chart



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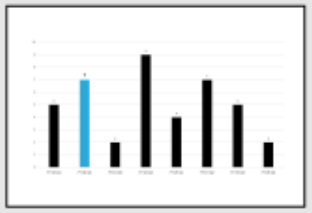

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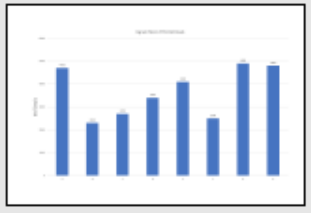

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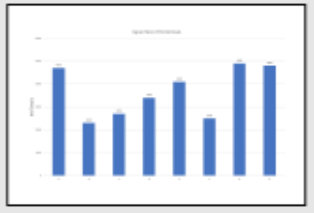

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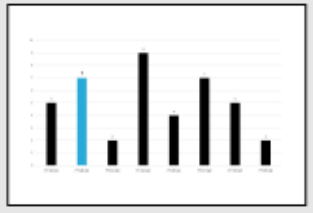

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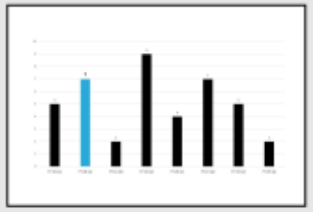

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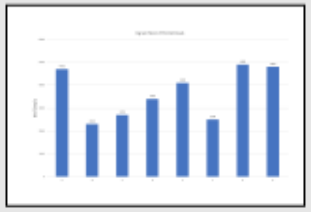

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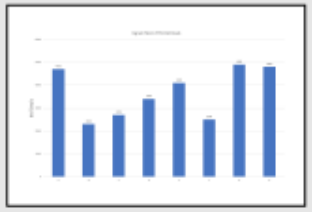

Title of Chart

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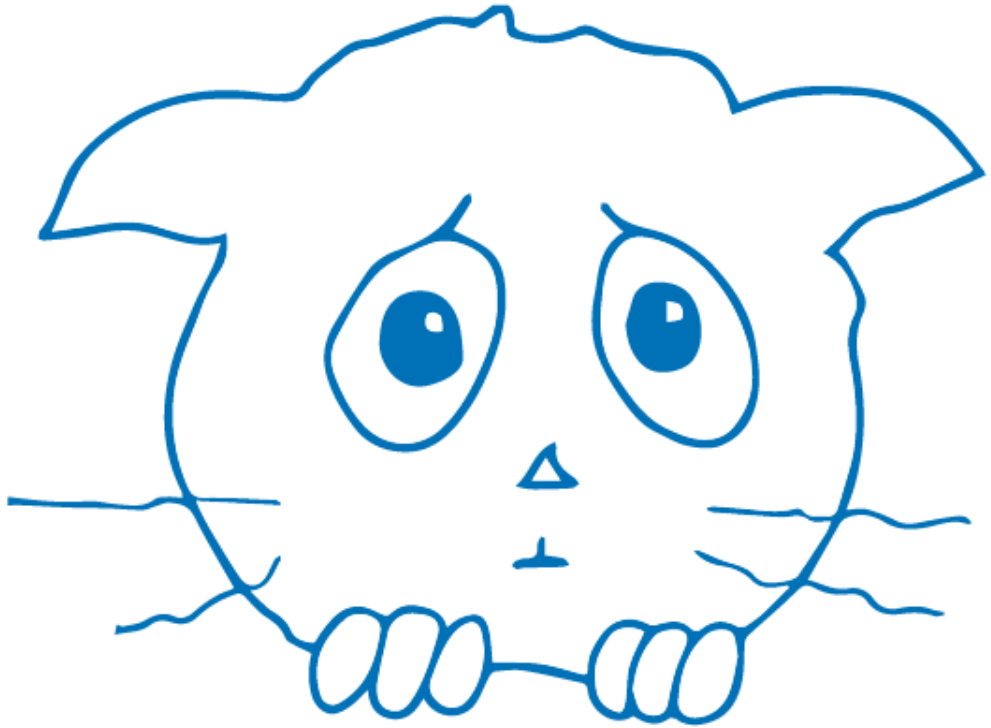
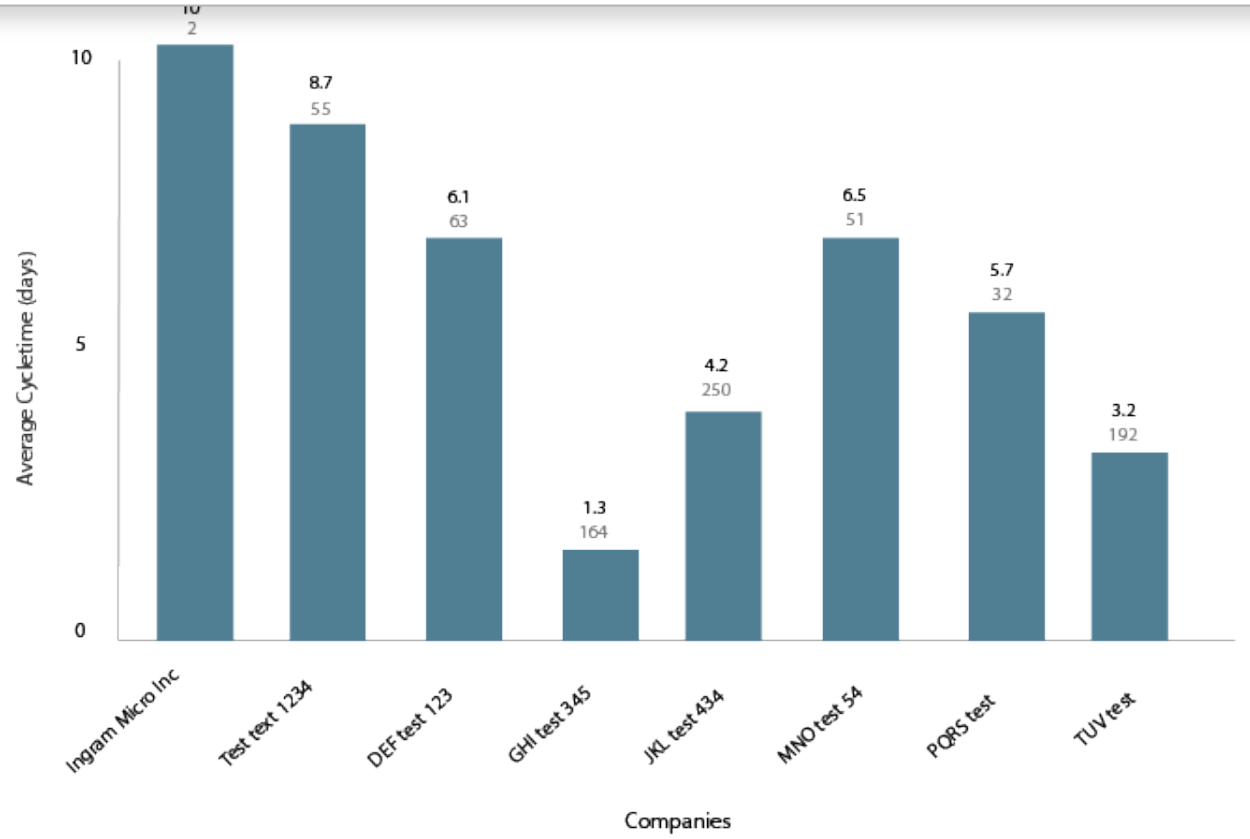
Sorry I didn't get that



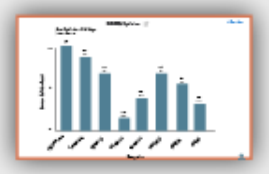
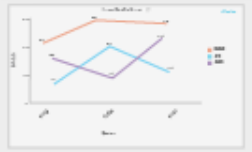
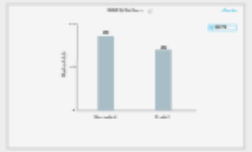
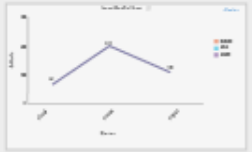
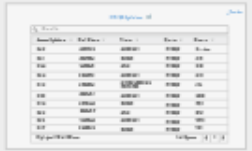
Sorry, I ran into an error

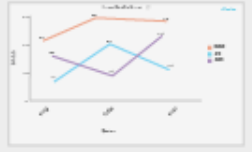
EMEAR dealcycletime Q2
EMEAR dealcycletime Q1
APJC dealcycletime Q2
Americas dealcycletime Q1
EMEAR dealcycletime Q3
EMEAR dealcycletime Q4



EMEAR | eal cycletime | Q

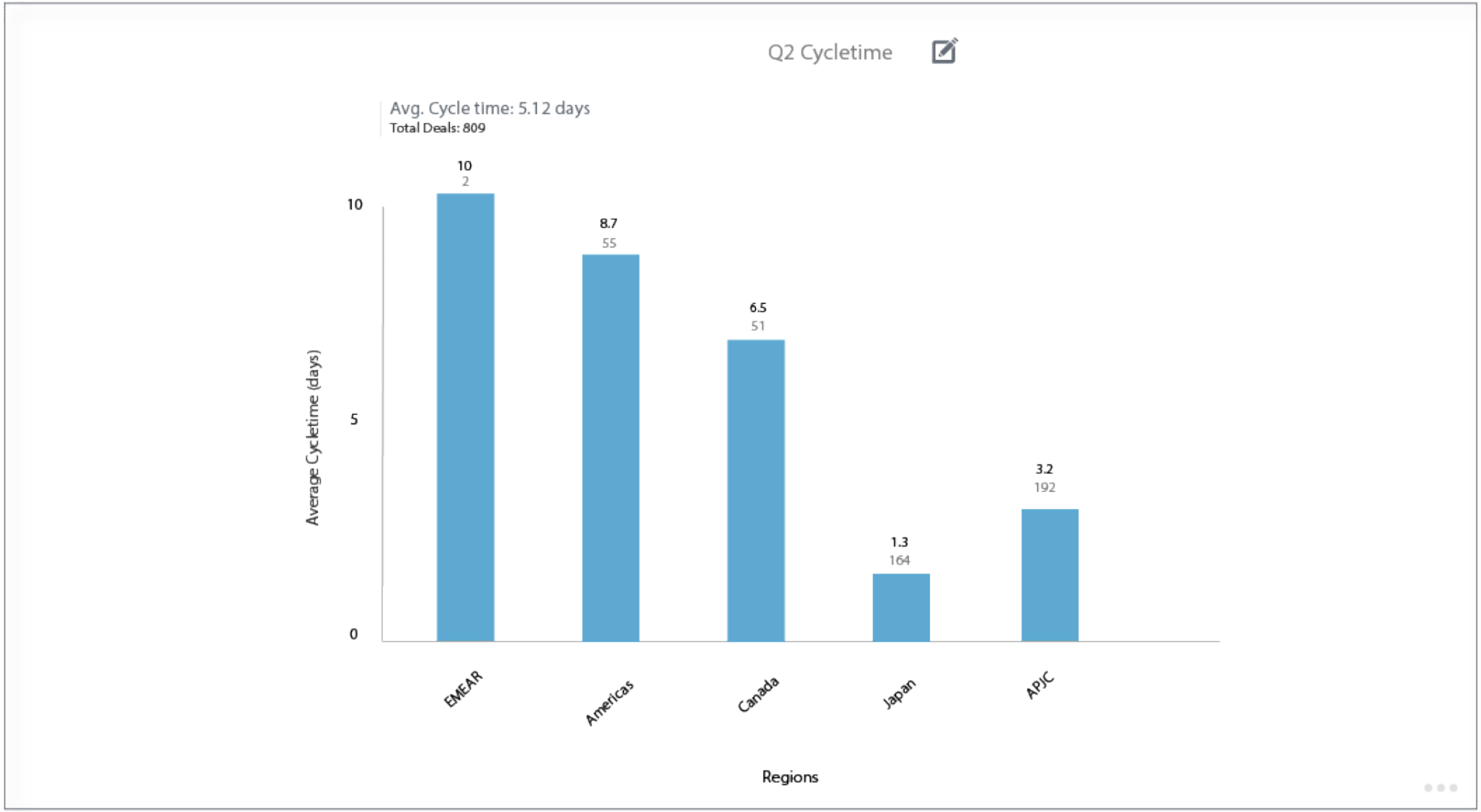
History



Q2 deal cycletime

Which theather would you like to see



What is the deal count for Verizon?

Ok, deal volume

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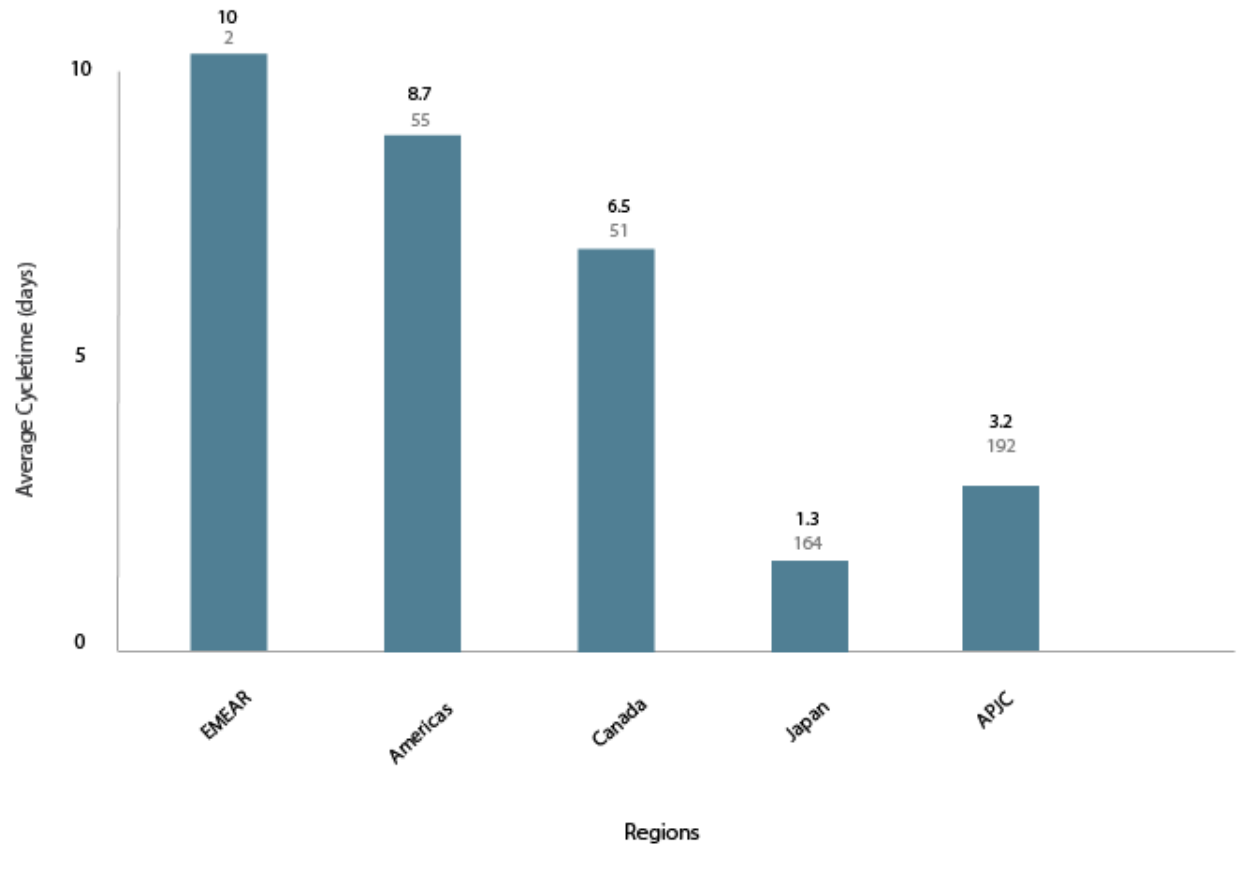
Q2 Cycletime

Avg. Cycle time: 5.12 days
Total Deals: 809



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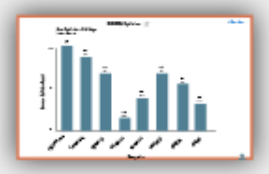
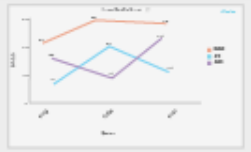
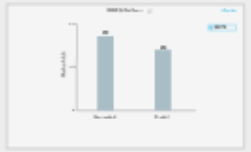
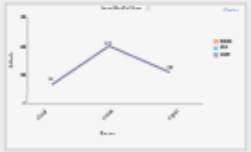
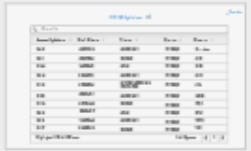
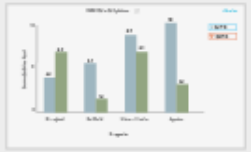
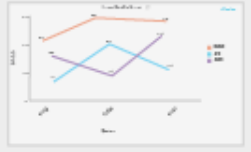
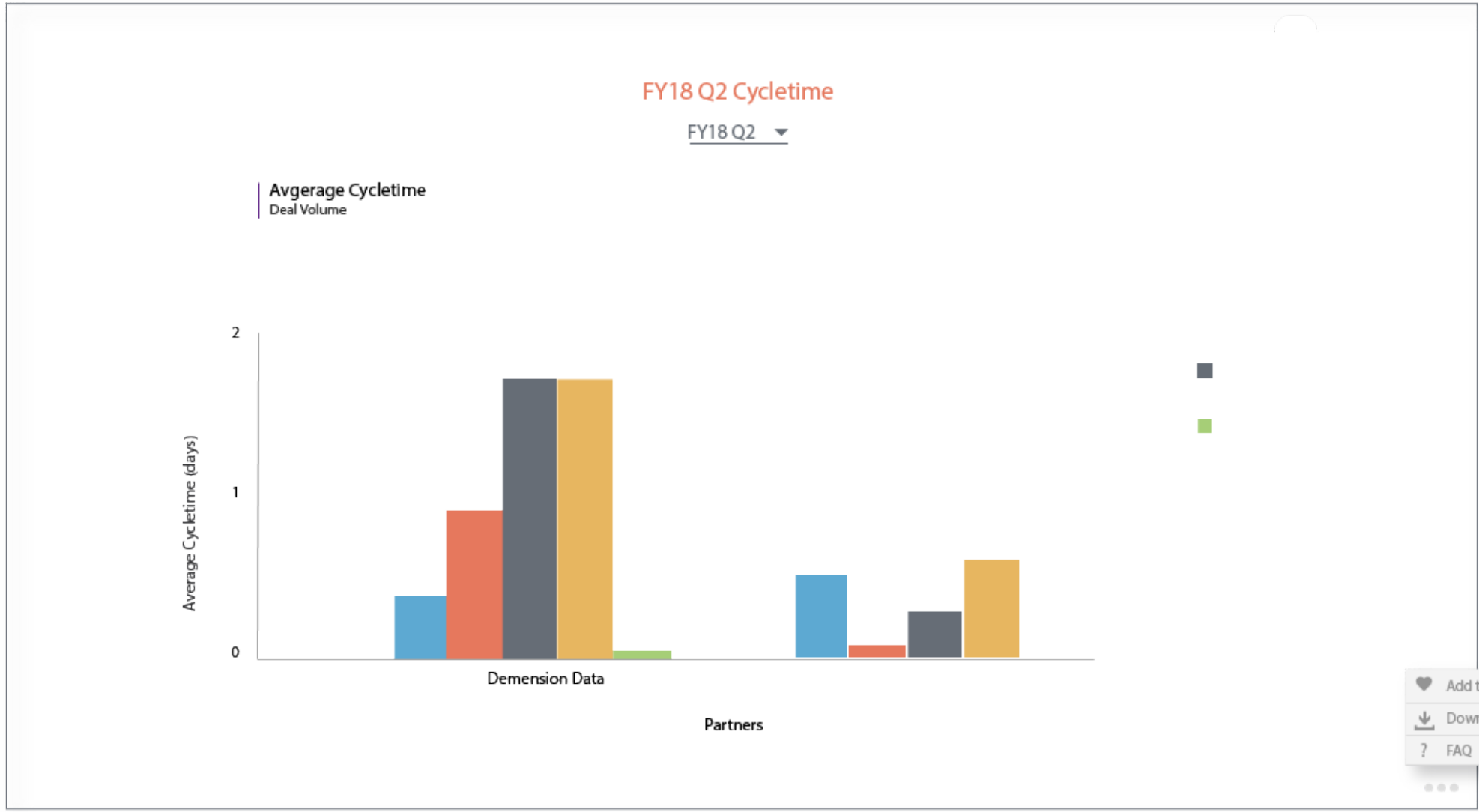








What is the cycletime for di data vs world wide tech by theater?

Sure



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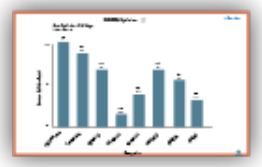

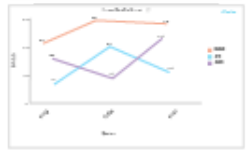

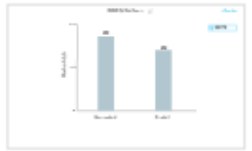

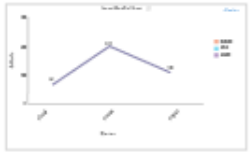

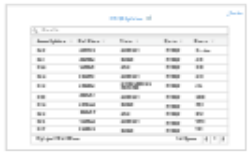

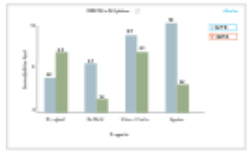

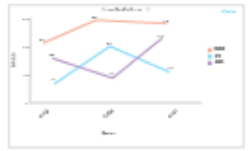

What is the cycletime for di data vs world wide tech by theater?

You can also view by individual theater

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FY18 Q2 Cycletime

FY18 Q2

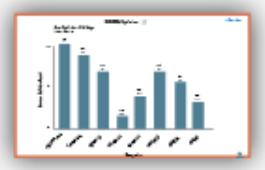
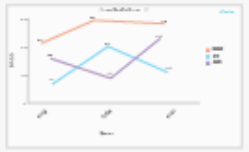
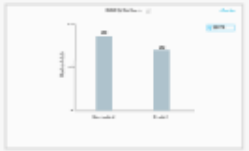
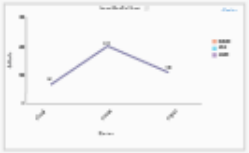
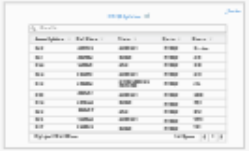
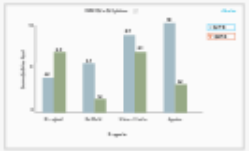
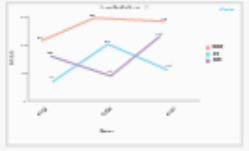
Avgerage Cycletime
Deal Volume

Average Cycletime (days)

Partners

FAQ

History

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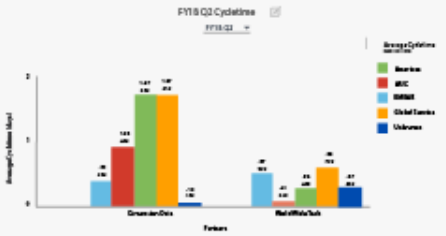
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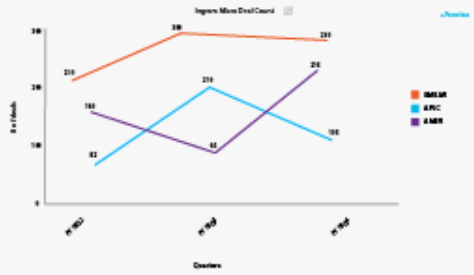
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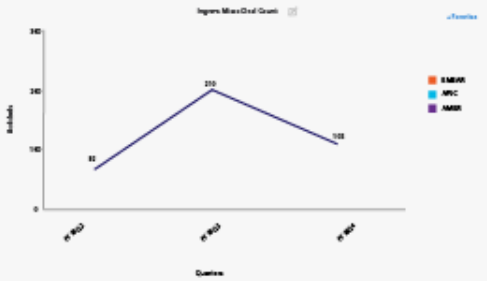
Titles ABCD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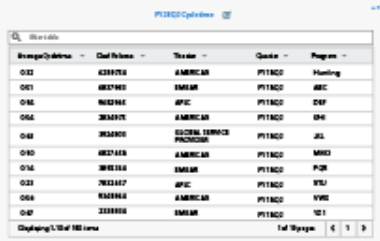
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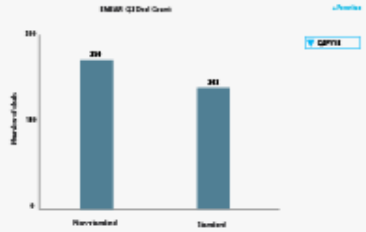
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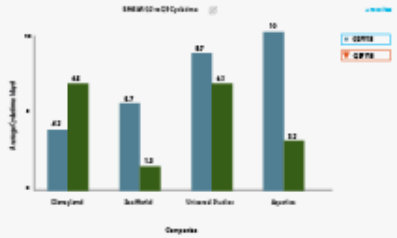
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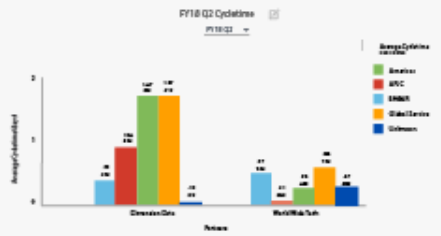
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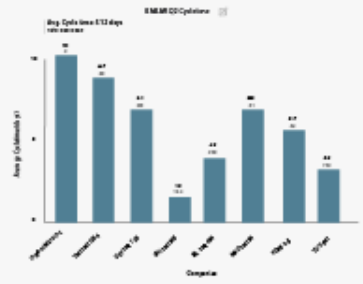
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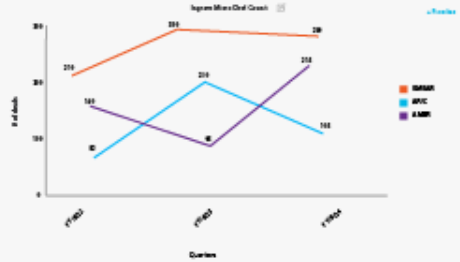
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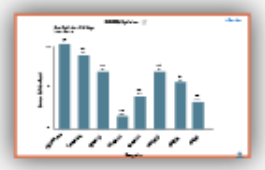
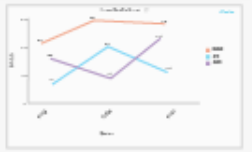
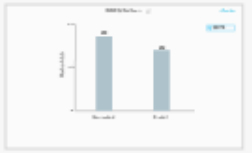
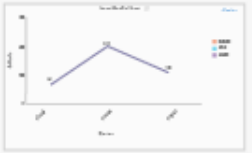
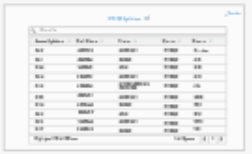
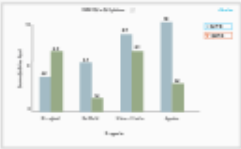


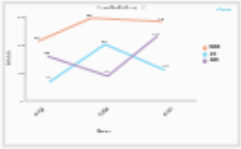








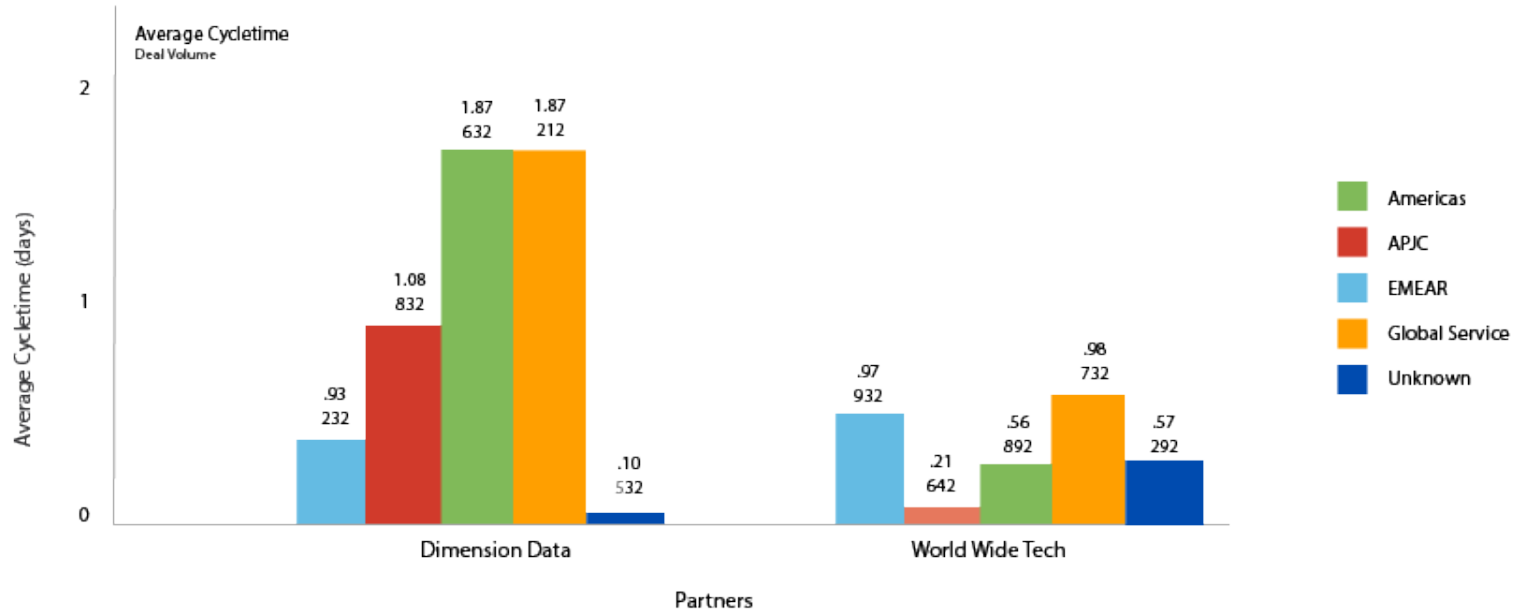




Q2!

What is the average cycletime for Di Data and World Wide Tech? VT

For what quarter?



Dimension Data | World Wide Tech | WebEx Offer | cycletime | Q2 | deal volume | APJC | standard | Partner Led | Greater than 3 days

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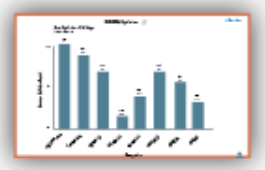
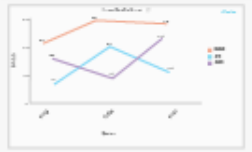
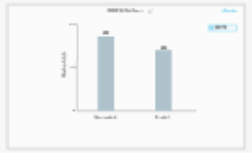
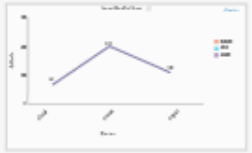
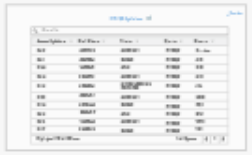
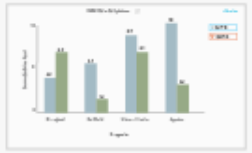
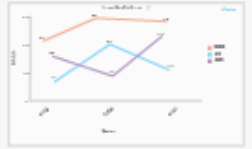
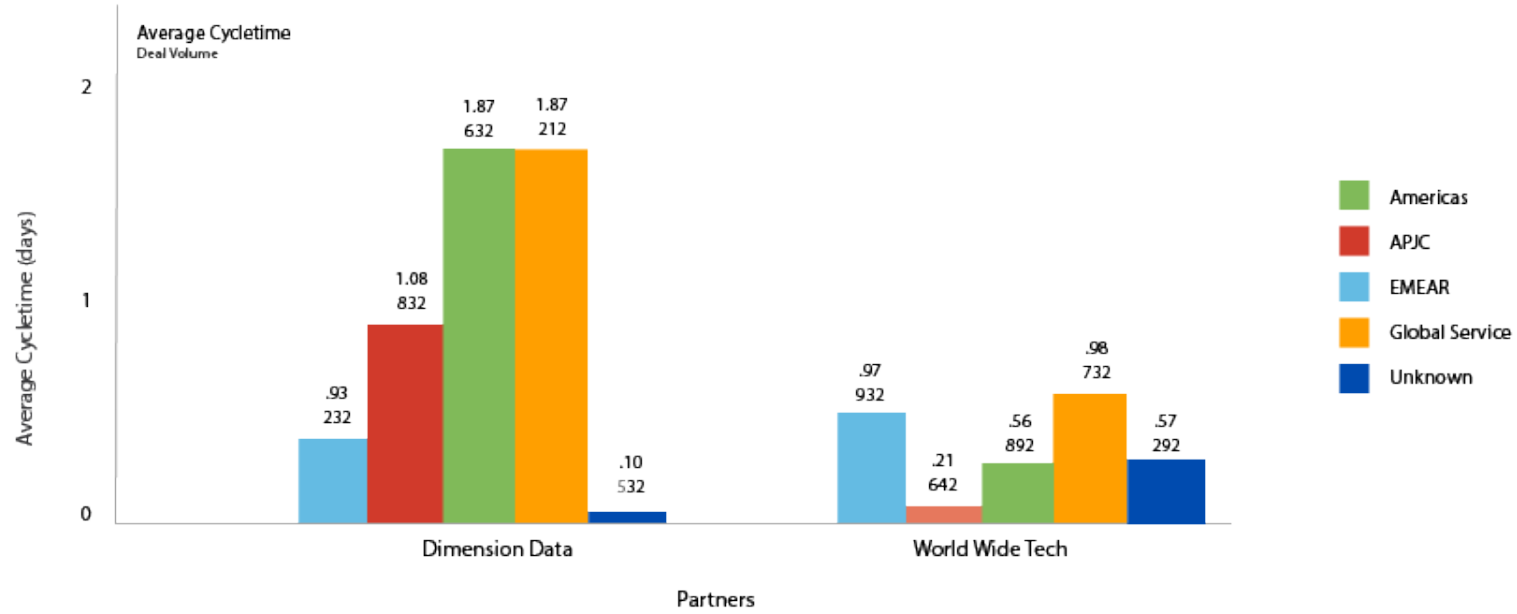








Q2!

What is the average cycletime for Di Data and World Wide Tech?

For what quarter?

FY18 Q2 Cycletime



Partners | Offers | cycletime | Q2 | deal volume | APJC | standard | Partner Led | Greater than 3 days

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