

*NCSC XVII  
Case Profiles  
2025*



QF Round



Round 1 & WC



SF Round



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# Round 1

## Case Info

You have been on the Gartner team for around 6 months. You found Green River Solutions on LinkedIn while researching companies known for their innovative approaches to technology. You did additional research via Sales Navigator.

**On LinkedIn Sales Navigator**

Revenues: \$120m – \$350m in revenue

Employees: 375 employees

1 yr. growth: 80%

HQ: Austin, TX

Founded: 2015

Ownership: Privately held

## What you Found

**Your Research:** Green River Solutions is a provider of cloud-based enterprise solutions, specializing in workflow automation, cybersecurity, and advanced analytics.

**Administrative Team from the website:**

- Chief Executive Officer (CEO): Blair Morgan
- Chief Marketing Officer (CMO): Monroe Favia
- Chief Product Officer (CPO): Patrick Shannon
- Chief Information Officer (CIO): Stefanie Boyer

## The Sales Call

The prospect is Blair Morgan, the CEO of Green River Solutions. You secured this appointment through Blair's admin. Detra Montoya, after multiple attempts to contact Blair.

You left 2 VM detailing how Gartner works with companies like Green River to expand markets and innovation. In addition, you had three LinkedIn connection attempts: The final attempt was accepted with a personalized message about Green River Solutions' growth potential.

In an email you included the following two links to Gartner Research:

[Gartner Insights on Market Entry Strategy](#)

[Gartner Research on Driving Innovation](#)

Blair agreed to the meeting to explore how Gartner can support Green River Solutions in entering new markets and managing innovation effectively

## Prospect Background

**Prospect Background:**

From LinkedIn: Blair Morgan

CEO of Green River Solutions (1 year 3 months)

VP of Strategic Initiatives at InnovateTech Solutions (3 years)

Director of Product Strategy at Advanced Systems Corp (2 years 8 months)

Consultant at Morgan & Co. (1 year 6 months)

**Education:** University of Texas, MBA in Business Strategy

**Skills:** Market entry strategies, product portfolio management, team leadership, data-driven decision-making





# Wild Card Round

## Case Info

You have been on the Gartner team for around 6 months. You found Green River Solutions through a referral from another satisfied Gartner customer, Horizon Technologies. The referral was to the company as a potential fit for Gartner's services, though it was not directed specifically to Monroe Favia.

### On LinkedIn Sales Navigator

Revenues: \$120m – \$350m in revenue

Employees: 375 employees

1 yr. growth: 80%

HQ: Austin, TX

Founded: 2015

Ownership: Privately held

## What you Found

**Your Research:** Green River Solutions is a provider of cloud-based enterprise solutions, specializing in workflow automation, cybersecurity, and advanced analytics.

Chief Marketing Officer (CMO): Monroe Favia

Chief Product Officer (CPO): Patrick Shannon

Chief Information Officer (CIO): Stefanie Boyer

Chief Executive Officer (CEO): Blair Morgan

## The Sales Call

You sent one LinkedIn message to connect with Monroe highlighting how Gartner can support Green River Solutions in achieving their marketing goals. You also sent two emails and included these case studies.

- [Positioning for a New Market and Audience](#)
- [Accelerating the Pace of Innovation](#)

Monroe agreed to the meeting to explore how Gartner can support Green River Solutions.

## Prospect Background

### Prospect Background from LinkedIn:

•**Name:** Monroe Favia

•**Current Position:** Chief Marketing Officer at Green River Solutions (1 year 4 months)

•**Previous Experience:**

- Director of Marketing at Horizon Technologies (3 years)
- Marketing Manager at InnovateCorp (4 years)
- Marketing Specialist at DigitalWave Solutions (2 years)

•**Education:** University of California, Berkeley, B.A. in Business Administration

•**Skills:** Strategic marketing, go-to-market strategies, brand awareness, customer acquisition, and team leadership





# Quarter Final Round

## Case Info

You have been on the Gartner team for around 9 months. You discovered Prism Innovations while researching top companies focused on cutting-edge technology development. After seeing a mention of their Chief Product Officer (CPO) in an industry article about driving product differentiation, you did additional research via LinkedIn Sales Navigator.

On LinkedIn Sales Navigator:

- **Revenues:** \$150m – \$400m
- **Employees:** 500 employees
- **1 yr. growth:** 90%
- **HQ:** San Diego, CA
- **Founded:** 2017

## What you Found

**Your Research:** Prism Innovations is a developer of advanced AI-driven platforms, focusing on predictive analytics and machine learning. Their current flagship product is widely used in healthcare and logistics. Their CEO, Shawn Kim, has publicly stated that Prism aims to become a leader in AI-driven decision-making tools across industries.

Administrative Team (from their website):

- **CEO:** Shawn Kim
- **Chief Marketing Officer (CMO):** Erin Dawson
- **Chief Information Officer (CIO):** Chris Swan
- **Chief Product Officer (CPO):** Jamie Morgan

## The Sales Call

You secured this appointment with Jamie Morgan, the Chief Product Officer, through their administrative assistant, Taylor Green. Taylor mentioned that Jamie is particularly focused on their upcoming product roadmap but did not elaborate further. You sent Jamie a personalized LinkedIn message referencing Gartner's support for product strategy and differentiation, including the following resources:

- [Gartner Insights on Product Development](#)
- [Gartner Research on Competitive Intelligence](#)

This led to the appointment.



## Prospect Background

### Prospect Background:

From LinkedIn: Jamie Morgan has been the Chief Product Officer (CPO) of Prism Innovations for 1 year and 8 months. Previously, Jamie held the following roles:

- **Director of Product Strategy** at NextGen Solutions (3 years)
- **Senior Product Development Manager** at AlphaCore Technologies (4 years)
- **Product Manager** at Innovate Systems (2 years)

Education:

- **B.S. in Computer Science**, University of California, San Diego
- **MBA in Product Management**, Stanford University

Jamie is recognized for expertise in crafting innovative product roadmaps and leading cross-functional teams to successful product launches in competitive markets.



# Semi Final Round



## Case Info

You discovered VertexTech while researching companies that are pushing the boundaries in tech innovation. The CEO, Alex Jensen, was recently featured in a business article discussing VertexTech's ambitious growth goals and plans to expand into new markets. You decided to conduct further research via LinkedIn Sales Navigator.

On LinkedIn Sales Navigator:

- **Revenues:** \$200m – \$500m
- **Employees:** 650 employees
- **1 yr. growth:** 85%
- **HQ:** Boston, MA
- **Founded:** 2014

## What you Found

VertexTech specializes in developing advanced cybersecurity solutions for the financial and healthcare sectors. Their CEO, Alex Jensen, has publicly stated a vision to make VertexTech a leader in next-gen cybersecurity, leveraging AI to provide more proactive defense mechanisms against cyber threats. The company has been actively exploring market expansion opportunities in Europe and Asia.

Administrative Team (from their website):

- **CEO:** Alex Jensen
- **Chief Marketing Officer (CMO):** Ryan Daniels
- **Chief Product Officer (CPO):** Taylor Morgan
- **Chief Information Officer (CIO):** Jordan Kim

## The Sales Call

You secured this appointment with Alex Jensen, the CEO, through Morgan Lee, Alex's executive assistant. Morgan mentioned that Alex is focused on finalizing VertexTech's strategy for market expansion and innovation but didn't provide further details. You sent Alex a LinkedIn message, referencing Gartner's market insights and strategic guidance to help companies achieve scalable growth, which prompted the meeting. As part of the message, you included a link to Gartner research on market expansion: [Gartner Insights on Market Expansion](#)



## Prospect Background

**Prospect Background** Alex Jensen is the newly appointed CEO of VertexTech. This is Alex's first role as a CEO, having previously held leadership positions in product development and market strategy. Before taking on this role, Alex served as:

- **Vice President of Product Strategy** at CyberNova Solutions (3 years)
- **Director of Business Development** at TechSecure Corp (4 years)
- **Senior Product Manager** at Innovate Systems (2 years)

Education:

- **B.S. in Information Technology**, University of Wisconsin-Madison
- **M.S. in Cybersecurity**, New York University

Alex is an expert in scaling businesses through innovative product strategies and navigating complex regulatory environments in the cybersecurity sector.