

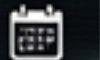
# Engineering the Caterpillar Pitch

A Dual-STAR Blueprint for the L4 Enterprise CSM Panel

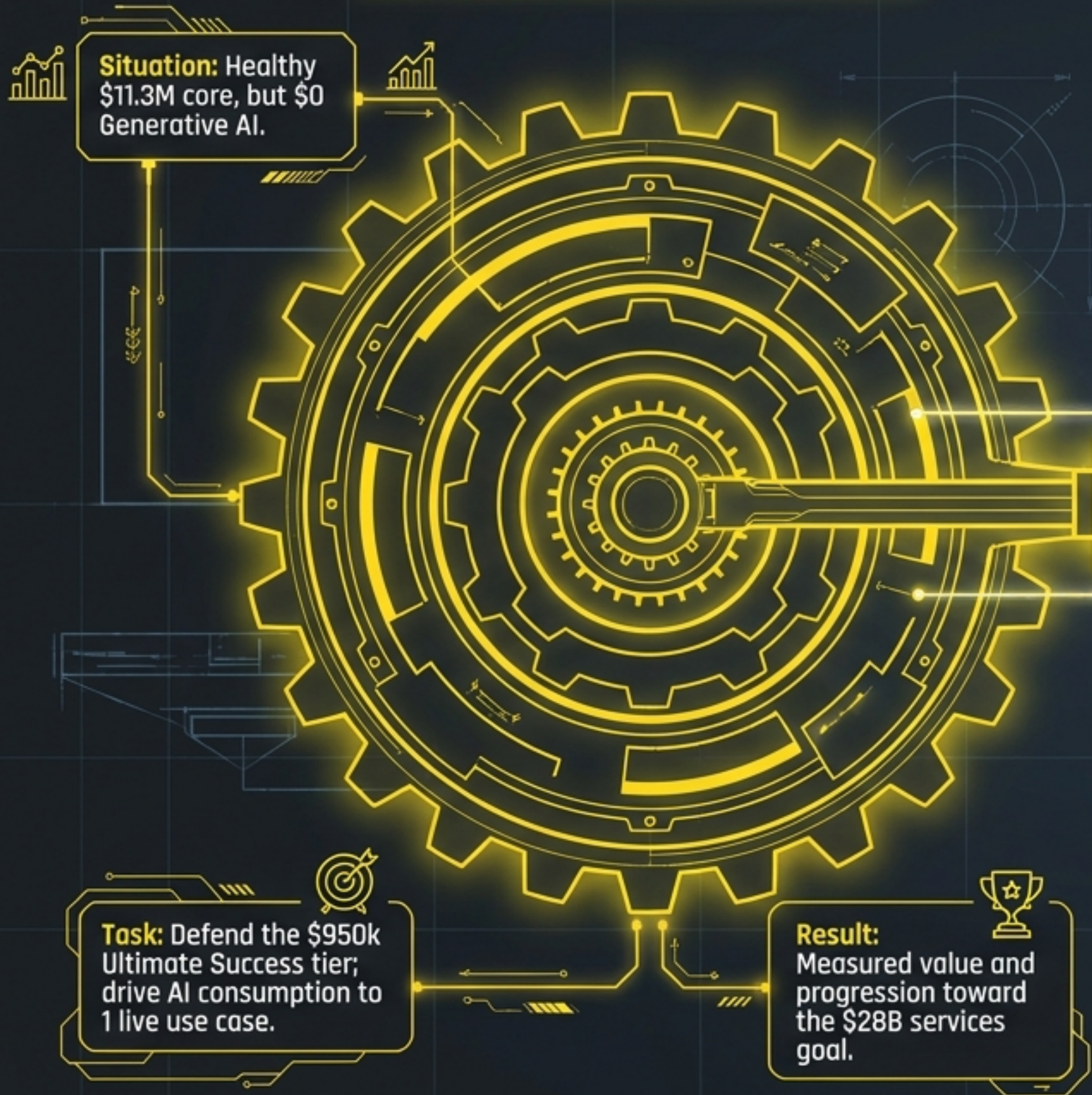
Target: Adobe Experience Cloud

Account: Caterpillar Inc.

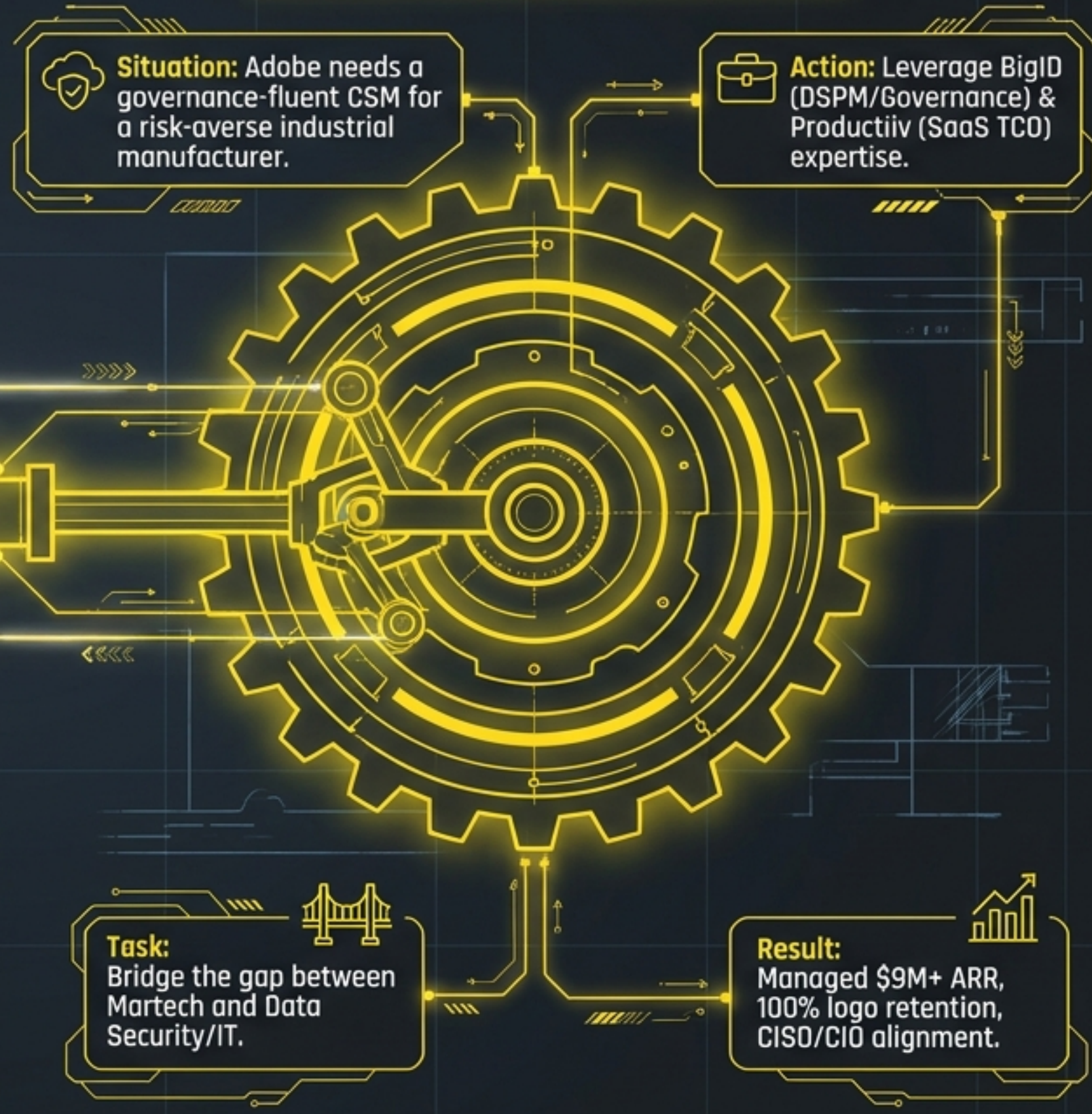
Date: Q3 Executive Panel







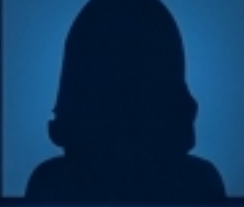
## The Macro-STAR: Caterpillar



## The Micro-STAR: Zach Fiorella



# THREAT AND ALIGNMENT MATRIX

PANELIST	CORE NEED	UNLOCK
 <b>Maggie Pelletier</b> (CMO / Dir CS)	Board narrative, \$28B services goal	End-to-end attributable aftermarket pipeline across the split funnel.
 <b>Rebecca Dillon</b> (VP IT / Sr CSM)	TCO, Vendor rationalization, Indemnity	Before any net-new purchase, activate the AI already inside your entitlement.
 <b>Devlyn Keith</b> (Head of AI / Mgr TAM)	Credible first win, Interoperability	Adobe's agents interoperate with Helios via the open Model Context Protocol.
 <b>Michelle Seitz</b> (VP Marketing / Group Mgr CS)	Brand consistency across 155+ dealers	Industrialize on-brand dealer creative without a central chokepoint.
 <b>Sharon Park</b> (Head of Digital / Mgr CS)	Governance, Adoption, Human-in-the-loop	One governed content supply chain across 1.4 million parts.

# PRECISION TIMELINE: THE 28-SECOND AI ACCELERATION PLAN



**STRATEGIC EXECUTION PATH FOR AI ADOPTION & SUCCESS**

## THE HEALTHY CORE

Adobe Experience Manager Sites: **\$4.2M ARR**

Adobe Analytics: **\$3.1M ARR**

Adobe Commerce: **\$2.8M ARR**

Marketo Engage: **\$1.2M ARR**

**TOTAL: \$11.3M ARR**

## THE THREAT & OPPORTUNITY

**\$0 AI PLATFORM  
CONSUMPTION**

The relationship is healthy, and that is exactly the risk. Strong core adoption sitting next to zero consumption of the generative layer means flat is now the threat. The goal: \$0 to 1 live, measured use case this quarter.

# CAT vs. ZACH: BRIDGING THE GOVERNANCE & VALUE GAP

 Caterpillar's Gating Concerns	 Zach's Structural Expertise
 Data Isolation & Security	 BigID DSPM & Privacy (Managed \$9M+ ARR in Data Security/Governance)
 Vendor Sprawl & TCO	 Productiv (SaaS Intelligence, GRC strategy, \$150K workflow upsell)
 Complex IT/Business Alignment	 Cross-functional orchestration spanning CIO, CISO, CFO, and Procurement

Caterpillar needs a governance and value conversation, not a Martech history lesson. Your background in cybersecurity, data privacy, and SaaS TCO is the exact language Rebecca (IT) and Devlyn (AI) speak.

## Cat Digital's Territory (Concede This)

- Operational & Engineering AI  
Cat Helios, MineStar autonomous trucks, predictive maintenance, 1.5M+ connected assets. Led by Ogi Redzic.

## Model Context Protocol (MCP)

Adobe Agent Orchestrator sits alongside Helios, not competing with it.

## Adobe's Territory (Claim This)

- Marketing & CX AI •  
Content Supply Chain (1.4M parts), Dealer Co-op (155+ dealers), Lead Routing.

# \$950k Ultimate Success = Measured Hard Dollar Outcomes

Ultimate Success - \$950k

## THE REALITY

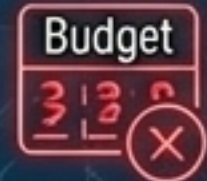
Ultimate Success is not a product. It is a Success Team (Named CSM, TAM, Support Mgr).



## THE VULNERABILITY

A budget owner sees \$950k with \$0 AI consumption and questions the investment.

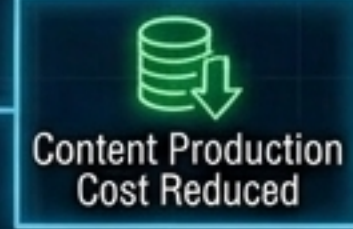
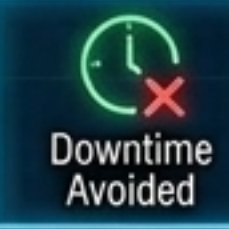
Budget Owner Question



## THE DEFENSE

Tie the tier directly to Success Accelerators consumed, launches accelerated, downtime avoided, and content production cost reduced.

Measured Hard Dollar Outcomes



“ Zach’s Talking Point: The number that justifies \$950k is not goodwill; it is the measured outcome of the first AI use case this success team delivers.

## Option A: Industrialize Dealer Creative (Play 1)

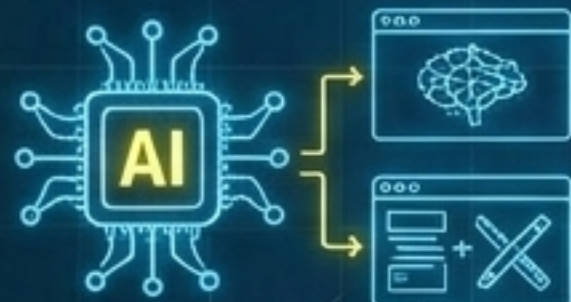
### The Pain

155+ independent dealers localizing by hand; risking the Modern Hex identity.



### The Tech

Firefly Custom Models + GenStudio for Performance Marketing.



### The Win

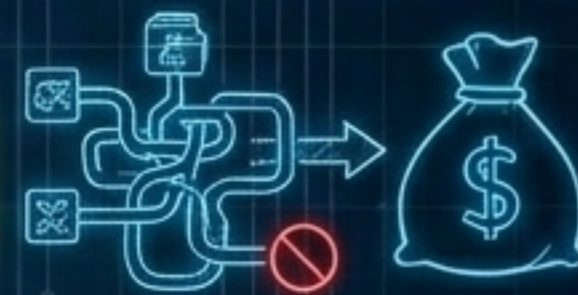
Mass-produce trademark-true creative, removing the central chokepoint. (Volvo Trucks & Lumen proof points).



## Option B: Aftermarket Lead Routing (Play 3)

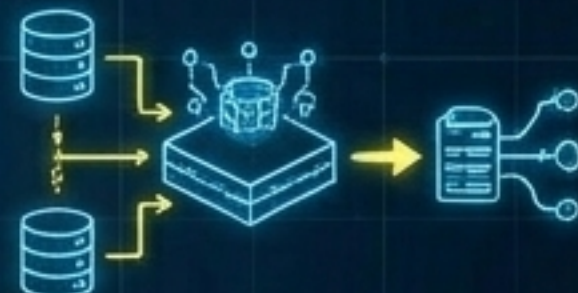
### The Pain

Reaching the \$28B services goal requires flawless B2B dealer handoffs.



### The Tech

Real-Time CDP B2B + Agent Orchestrator (Account Qualification Agent).



### The Win

Stitch Helios + telematics to route demand to the correct territory.



Strategic Directive: Offer ONE of these as a bounded, 90-day lighthouse project.



### **The Core: Commercially Safe & Indemnified**

Firefly models train on licensed content, keeping Caterpillar's intellectual property entirely isolated.

### **The Audit Trail: Content Credentials (C2PA)**

Tamper-evident provenance on every asset to defend against deepfakes (vital for heavy machinery safety brand).

### **The Control Room: Human-in-the-Loop Orchestration**

Agent Orchestrator ensures no agent acts on parts.cat.com without prior authorization.

**“ This is the exact governance framework I used to secure \$9M renewals at BigID. It’s what lets Devlyn and Rebecca say ‘yes’.”**

# Day 30

## Learn & Broaden



- Establish composite Customer Health Score.



- Audit current entitlement pacing.



- Open direct threads with Head of AI and VP of IT to avoid single-threading through Cat Digital.

# Day 60

## Scope & Commit

- Pick one bounded Lighthouse (Dealer Creative or Lead Routing).

- Pre-load the governance answer (C2PA, Firefly indemnity).

- Identify the exact Success Accelerator from the \$950k Ultimate tier.

# Day 90

## Prove & Measure

- Go live with 1 use case.

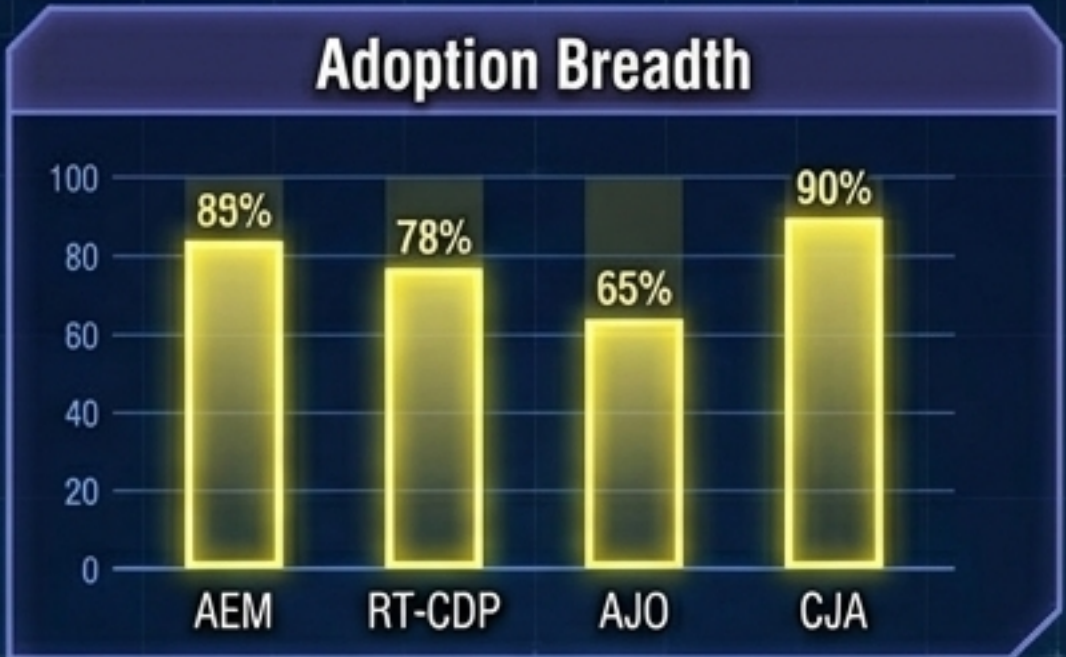
- Refresh value case for QBR.

- Single metric moves off the \$0 baseline.

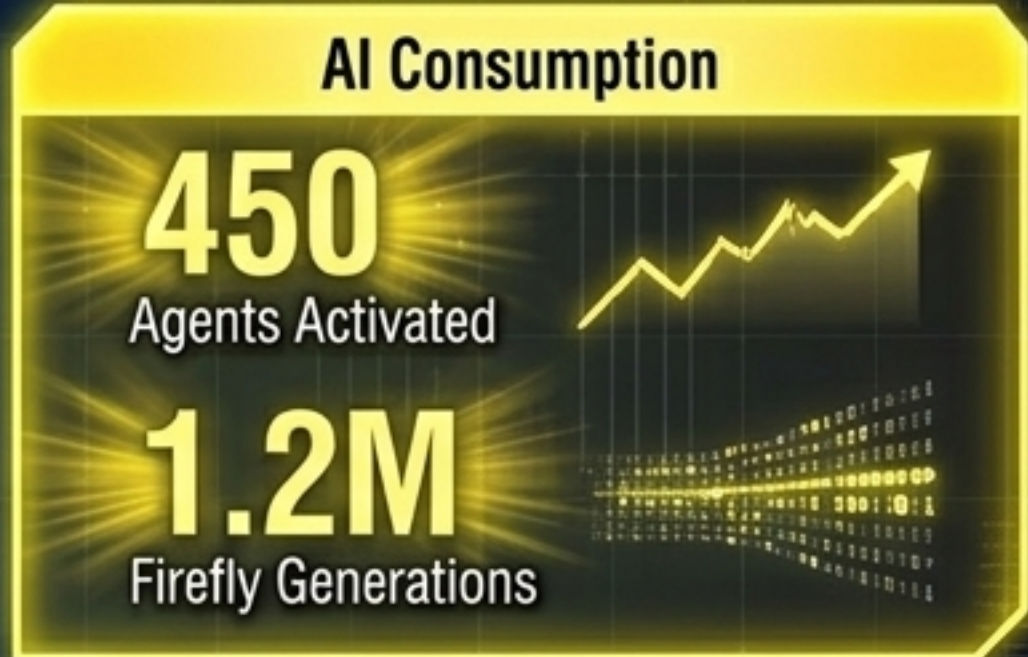
# All metrics feed into the ultimate CMO goal: **The \$28B services revenue by 2026.**



Reviewed every QBR.



Monthly active users across AEM, RT-CDP, AJO, CJA.



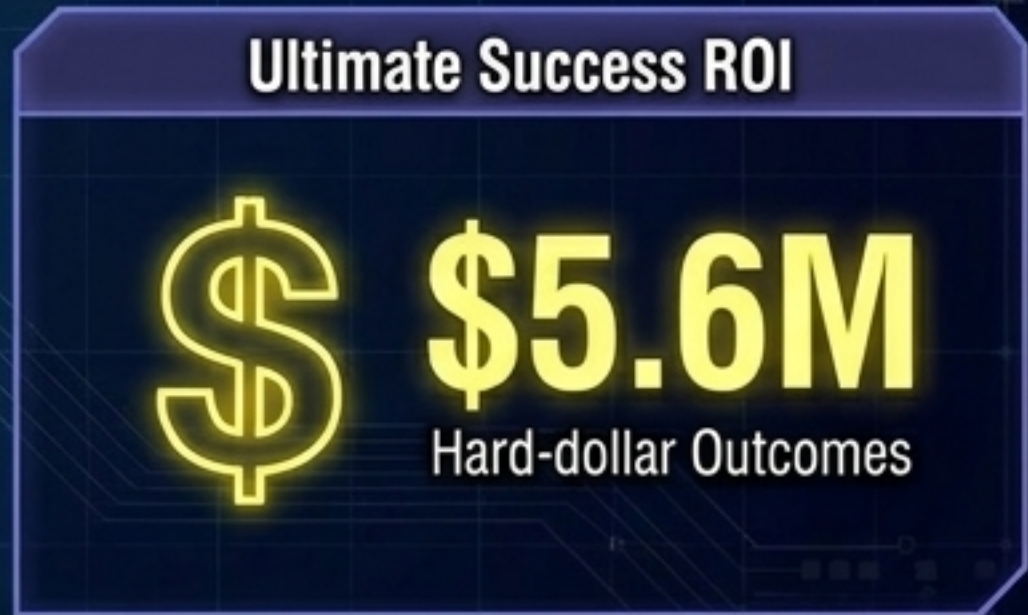
The primary target. Agents activated, Firefly generations.



Preventing shelfware and true-downs.



Time-to-market per launch, content cost per asset.



Hard-dollar outcomes defending the \$950k.

# Red Flag Diagnostic: Attack & Defend

The Objection	The Trap	The Rebuttal
Your competitor is cheaper.	Arguing line-item features.	<b>Total Cost of Ownership (TCO).</b> A new tool means new integration, governance, and IP risk. Frame as “Buy vs. Already Bought”.
We build our own AI agents.	Defending Adobe as a replacement.	<b>Interoperability.</b> Keep Helios for operational data; use Adobe’s Orchestrator for CX data via Model Context Protocol.
Dealers will resist centralization.	Arguing for corporate control.	<b>Distributed execution.</b> Brand-locked templates in Express give dealers more autonomy, removing the central chokepoint.

# Practitioner's Tech Stack



**“I am a practitioner who already runs on the product, not a vendor selling it.”**

- **Remind the panel** that this very preparation was built using Acrobat AI, Firefly, and Express.
- **Offer to open the** Content Credentials panel live to prove the provenance of the deck.
- **Close on the partnership:** You aren't pitching adoption; you are bringing a decade of governance and retention expertise to make their AI layer safe and renewable.