# MicroScope

INDISPENSABLE CHANNEL ANALYSIS

JULY-AUGUST 2024



## Rolling the dice on risk

### Is the channel's risk-averse nature a bad hand or careful strategy?

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# Is the time right for AI machines?

Whenever a technology hits maximum hype, the question from a channel perspective is simply: when will it make me money? It is no different with artificial intelligence (AI)-capable PCs.

A wave of products is on the way and the channel is hoping that these products will provide a chance to pitch upgrades and hardware investments. So, in one sense, if the question is whether or not AI will make money, the answer is clearly a yes. But where things are not so clear is in the timing.

This year will see a portion of PC sales, including AI-capable machines, that could be between 10% and 15%. That doesn't sound like much, but it is a start. From there, it will increase into 2025 and beyond. Twinned with the move towards Microsoft Windows 11, there is a sense that it is going to get harder for users to cling onto ageing systems.

The danger is to park AI hardware for now and then wait until a more significant portion of sales involve the products. That would be a mistake because right now is the moment to learn about the technology, understand what it means and get to grips with the use cases that will help demonstrate return on investment to users.

Talk to those involved with the PC world and there is a sense that these AI products are different. It's not the usual new operating system or more powerful processor driving the upgrade debate. This is about smarter machines that can help their users and potentially change the way we all use hardware.

**THIS IS THE BEGINNING OF THE NEXT STAGE OF PC EVOLUTION. IT'S GOING TO MOVE SLOWLY BUT FIRMLY IN ONE DIRECTION, AND WILL ANSWER THAT SIMPLE QUESTION OF, "IS AI GOING TO MAKE THE CHANNEL MONEY?"**

This is the beginning of the next stage of PC evolution. It's going to move slowly but firmly in one direction, and will answer that simple question of, "Is AI going to make the channel money?". It should also tick that other box of making customer lives easier in the process. A classic win-win that's going to be worth waiting for. ■

*Simon Quicke, editor*

# Time to gen up on AI-capable PC use cases

*The channel has been advised to ensure it can understand and can support users with the move to hardware that is taking advantage of artificial intelligence, with the tech expected to boost sales this year. Simon Quicke reports*

Artificial intelligence (AI)-capable PCs are on their way to populating the market, with the channel expecting the technology to have a real impact this year.

Given the challenging times in the PC world since the highs of the pandemic-induced purchasing, the idea of a fresh pitch – with Windows 11 also sparking upgrades – means there is a different narrative emerging in the hardware segment.

Brandan Lieberthal, vice-president of PC systems and print solutions for Europe at TD Synnex, is in a position to chart the progress of AI and share realistic expectations of what the technology could mean for sales this year and beyond. There is plenty of hype, but it is going to take time in terms of user adoption.

"The industry as a whole is probably expecting it to be the early adopter phase. I have seen numbers bandied about ranging between 10% and 15% of replacements this year would be done on AI-enabled PCs," he said.

The temptation to make comparisons with how PC sales responded to fresh technology waves in the past is perhaps not one that will be applicable when it comes to AI.

"10% to 15% isn't huge. However, it is a new technology and we need to think of it slightly differently than versus the past," said Lieberthal. "When we talked about technology changes on personal computers in the past, it was really either around an operating system or about a process of speed, and not to take away.

"But the fact remains those were typically the two things that were driving the step change. Now, it's going to be looking at it from a slightly different angle. Hardware is going to enable the applications and the use cases."

Those use cases are continuing to emerge, and for that reason this is very much the launch phase of AI-capable PCs.

"As people can see more of the use case, you will see the ramp up, but...I think we'll be early adopters, [testing] the ecosystem to see [whether it is] returning the investment," added Lieberthal. "The applications will have to bring your return on investment through efficiency, power consumption, security – whatever your use case. But you will have to be justifying that additional spend with a return on investment."

With the emergence of more use cases, the prospects for 2025 and beyond are of higher sales and a more fundamental shift to AI-capable PCs.

Lieberthal said that TD Synnex has made significant efforts to get itself into a position where it can support the channel around

AI, recently cutting the ribbon on its Destination AI programme to provide end-to-end support to partners. The channel player is covering a handful of key areas to ensure it can provide the support partners need.

"The first one being awareness," said Lieberthal. "With this technology, it's no longer just about feeds and speeds having to be a solution. So, a lot of people are still not sure what it is. They may understand about the neural processing unit tops, but how [do they] take that out as a value proposition to customers? We need to make them aware of [what the] technology is, what the applications are, and how you can use them."

The next pillar of the firm's strategy is around enablement to ensure partners can take their customers on an AI journey. Virtual labs, testing options and advice around required infrastructure are all part of that process.

"The last piece will probably be after sales. How do we again provide services and ongoing support so that they maximise their revenue out of the solutions that they sell?" Lieberthal said.

"So far, we've onboarded 40 vendors to that programme. We plan to expand that across both physical hardware products into the software, the applications, our datacentre teams, and so on," he added.

When it comes to the channel, its time would be spent wisely now by getting into a position where education and support can be developed and then delivered to customers.

"It's not just about the dimensions, the weight, the cooling fan – it's a solution. The channel needs to get teams well-versed on the technologies and the use cases," said Lieberthal.

"The channel needs to think about how to go to market and make customers aware of this technology, as well as how to could use it and benefit from it. The channel will need to get its infrastructure ready as well."

Lieberthal echoed the views of many in the PC world talking about the opportunities that are stretching out across the rest of this year and beyond.

> **"THE CHANNEL NEEDS TO THINK ABOUT HOW TO GO TO MARKET AND MAKE CUSTOMERS AWARE OF AI TECHNOLOGY"**
> BRANDAN LIEBERTHAL, TD SYNNEX

"We've got two big opportunities on our plate for the next quarter, and months [beyond]. We've got Windows 11, which we need to talk as much about as we do AI, and we've got the AI journey. We need to find ways to bring those two conversations together."

One or the other driver might spark investments, but they are connected and the channel needs to be able to frame artificial intelligence technology into that broader conversation.

"Even if [users are] not going to transition to an AI-enabled PC right now as part of Windows 11 migration, it's the perfect opportunity to talk about it," Lieberthal concluded. ■

# Not all artificial intelligence is created equally – and neither are humans

*Lance Williams, chief technology officer at Distology, is convinced that the human factor should not be underestimated in the front-line fight against increasingly advanced AI-generated threats*

Humans cannot analyse at the same continuous speed as artificial intelligence (AI), but AI cannot contextualise as well as humans. So, despite the growth of AI in cyber security defence, detection and response solutions, it's about teamwork between AI and human intelligence (HI).

Fighting AI with AI is essential for the continual speed of data analysis and correlation, but, as Simon Quicke recently wrote, "One of the problems with dubbing technology AI-capable is that it's a label that covers a wide spectrum of outcomes." Not all AI is created equally – and neither are humans.

## Game-changing tactics

Billions of dollars have been spent over the past 10+ years on security awareness training and testing (SATT), and the spend is predicted to increase to $10bn by 2027, according to Forrester. Yet, malware infections such as ransomware, business email compromise (BEC), and account take overs (ATO) continue to wreak havoc and are increasing year on year despite a huge spend. What are we to do?

When the game changes, game tactics need to change too. However, customers aren't being served game-changing tactics because of the inertia in the solutions being offered by the cyber security channel that serves them. Few channel partners have a thorough understanding of the importance of identity and access management (IAM), which is an essential part as the backbone to any and all cyber security strategy.

It's not all on the channel though. The best technologies entering the market are still targeted at enterprise and large enterprise – their tech isn't necessarily limited to the upper end of the market, but the price tag is – because everybody knows that's where to find the best and biggest money.

That leaves the lifeblood of every country – the midmarket – in limbo. There is a massive surface area of humans who sit on the digital frontline against the ever-sophisticated cyber threats being generated by state and private threat actors. Yes, threat actors are still after our and our organisations' money, but state-sponsored threats are after our critical national infrastructure and national secrets.

## AI CAN BE BENEFICIAL

AI can seriously help in security operation centre (SOC) environments. The most advanced SOCs aren't handing the keys and steering wheel over to Skynet though, they're putting the AI in to do the continuous data crunching and analysis more consistently and efficiently than humans, and then layering in the human intelligence to provide the organisational and human-nuanced context that the AI can't do.

AI can deliver moderate benefit on the IT endpoints – for example, within Outlook or the web browser. Organisations such as ThinkCyber are really exercising the copilot concept to help guide and educate IT workers as they work.

The generation of human risk management platforms, such as Keepnet Labs, are focused on generating greater depth of understanding and analysis of each IT workers' behaviour to help automatically generate the most appropriate training and simulated attacks on the worker.

Simon Nicholls, vice-president of UK at Keepnet, said: "The human factor is still the weakest link in the security chain. This is why [Keepnet Labs] focuses on testing a wide range of human behaviour across email, voice, SMS, QR codes and callback requests to give a holistic risk score to individuals and teams within an organisation."

No AI today can prevent a person clicking on a link in an SMS on their smartphone – and it's these pocket-sized personal datacentres that we use the most both in work and in our own time.

Operational technology environments are the low IT honeypot for threat actors. You only need read a summary of the EU's NIS2 directive to understand that these are high-profile, high-impact verticals that can knock an entire national economy off kilter. In May 2023, Fortinet cited that three-quarters of operation organisations reported at least one intrusion in the previous 12 months. These largely low IT environments are being compromised via the low cyber security-educated OT professionals interfacing with digitally awakened OT equipment that largely don't have cyber security defences. No AI will help this anytime soon, but enhanced HI will.

**WE CANNOT TAKE OUR EYE OFF THE VALUE OF HUMAN INTELLIGENCE ON THE FRONTLINE AND IN OUR SOCS**

To summarise, while supportive of AI and recognising it as a critical innovation in the fight against the threat actors, we cannot take our eye off the value of HI on the front-line and in our SOCs. It is essential to have better understanding and harness human behaviour. Humans are powerful processing units, which can be used against ourselves, or for the betterment of all those around us.

The call-to-arms is to shed our flab of ignorance and tone our cyber security awareness knowledge. Combine this with state-of-the-art cyber defence, detection and response systems leveraging some help from our digital artificial intelligence companions, we stand a chance. ■

# Is it worth taking a risk in the channel?

*There may be hesitation in the channel when it comes to making risky decisions, but is risk needed if the channel is to grow? Billy MacInnes reports*

NUTHAWUT/ADOBE

The channel being historically very risk averse is not a statement you'd normally associate with the technology industry – after all, it's the same industry that popularised the term "bleeding edge".

Yet Carolyn April, vice-president of industry research at CompTIA, is unequivocal in her belief that the channel's aversion to risk "often keeps channel companies the same size year after year. They are not willing to take the risk."

Her comments were made at the launch of CompTIA's *State of the channel 2024* report, which found that only 23% of channel businesses described themselves as having "high risk tolerance".

Tom Henson, managing director at Emerge Digital, says: "It's understandable why some might perceive the IT channel as risk-averse – and in some cases, it is. However, it's a mix; some vendors are eager to innovate, while others are more reserved."

Adopting new technology can be complex and time-consuming, so many partners must weigh up the potential benefits with the investment of time and resources. "MSPs [managed services providers] are also wary that, with the constant advancement of new technology, today's best can quickly become outdated," adds Henson.

He argues that there are pros and cons to this approach. While it ensures stability, it can mean running the risk of missing out on innovation. "From our experience, clients prefer forward-thinking firms, and for those in the channel which are too risk-averse, it may prove difficult to keep up," he says.

Henson admits that Emerge Digital has taken chances on disruptors with mixed results. "However, overall, it has been positive,

HOME

and any failed ventures have taught us valuable lessons, shaping our approach to new tech.

Ultimately, the channel will be shaped by what customers want and need, and it's our job to be on the pulse of all new, emerging tech so that we can advise on and implement new solutions for our clients."

Chris Shaw, UK&I and SA country channel manager at AvePoint, disagrees with April. "Most channel companies are not risk adverse, they're just very particular about who they partner with and which technologies they invest in," he states.

This seems a fair point, with Shaw citing the example of a new vendor or market emerging where it's quite clear that channel companies should analyse the space and players to determine alignment.

"Growth in the partner community is driven by spotting customer needs and opportunities to build services that really address those challenges – whether it's data backup, AI [artificial intelligence] readiness, information governance or otherwise," adds Shaw.

> "Growth in the partner community is driven by spotting customer needs and opportunities"
>
> Chris Shaw, AvePoint

Hayley Roberts, CEO at Distology, agrees that risk-taking is in the eye of the beholder. "Risk taking is incredibly subjective, not just due to the nature of the channel business – be it vendor, reseller or distributor – but also to the individuals and groups that own and run it," she says.

The general perception is that because tech is fast growing, companies must take obvious and visible risks, but we have seen very recently that this isn't always the case.

"The channel has seen knocks and a downturn based on the macro economy and customers being less willing to spend, especially on new software," says Roberts. "There is definitely a note of caution in the channel from what I have observed, which is sensible in slightly more uncertain times."

Nevertheless, channel business owners such as Roberts take risks in developing the strategy and making decisions every day, even if they don't consider themselves to be risk takers. "I believe it is a bold statement to suggest channel businesses generally are not taking risks," she adds.

## Appetite for risk

Ross Teague, CEO at Nebula Global Services, is not surprised by the 23% figure. For many years, the technology channel was a vendor-led marketplace, with manufacturers in control of defining the rules of engagement and predominantly working in silos with their channel partners to go-to-market with technology-led solutions.

This meant channel partners didn't need to become high-risk businesses because they followed a formula governed by the vendors they partnered with. "Trying to introduce anything

different was like swimming against the tide, so the majority of companies simply stayed in their lane and were very successful as a result," Teague says.

The negative connotations associated with the word "risk" could also account for some of the reluctance to be perceived as a risk taker. The fear of failure is strong.

He agrees with Roberts that business leaders manage risk at all levels on a daily business. "Everything we do in our lives carries an element of risk, so it is the decisions we make that mitigate that risk," he says.

Perhaps channel businesses are exercising caution because they don't want to risk the relationship they have with their customers. Teague accepts that "there have been many successful companies in the technology channel that have taken a more cautious approach to running their business. For every maverick business that succeeds, many others fail, so this isn't a one-size-fits-all process."

Product-led businesses often fail when they migrate to a solution-led trusted adviser approach without the necessary tools and processes to equip their team with this level of transformational change, according to Teague. Some of the risk aversion may be down to the short-term quarterly or annual focus on ROI because the channel has been built on the distribution of marketing development funds (MDF) led by the vendors. But channel companies should also be looking to the medium and long-term impact of building brand equity.

"It's similar to when a political party comes into office, and they can only impact short-term, transactional projects before their


NUTHAWUT/ADOBE

term expires, whereas there should also be a focus on the big picture, transformational, long-term projects," Teague says. "Only then will companies come to realise that, if managed correctly, a little risk can bring significant reward."

Ann Keefe, regional director, UK and Ireland at Kingston Technology EMEA, is adamant that the channel is not risk averse at all, with some companies investing in new technology and others taking a more cautious approach.

"Resellers can't afford to sit still. I don't know any who think they should stay the same simply because they are doing a good enough job with their customers. They always want to do more and to grow," she says.

Keefe believes the appetite for change can vary according to company size. "Those that are big must consider their responsibility to shareholders and might move more slowly, while smaller resellers can be nimbler," she says. "This might impact on their appetite for risk from time to time, but it doesn't mean they are doing nothing. This is a dynamic industry with a dynamic channel."

Stefanie Hammond, head nerd at N-able, doesn't agree. "I don't think channel companies start out being risk-averse, but they evolve to becoming risk-averse over time," she says. Many MSPs and channel companies started because someone decided to venture out and start a business of their own.

> "Resellers can't afford to sit still. I don't know any who think they should stay the same. They always want to do more"
>
> Ann Keefe, Kingston Technology EMEA

"Being an entrepreneur and walking away from a stable workplace to start your own business is a core trait of risk-tolerant individuals. Being an entrepreneur requires strength and fortitude that many individuals do not possess," Hammond says.

But once the company gets going, and the reality sets in that they need to start selling their product or service to gain customers to keep their doors open, "these entrepreneurs can quickly become more risk-averse, because their customers are making them so", she adds.

In the case of security, for example, new technologies require MSPs to make proper investments in them. "They need to purchase them, learn how to use them, and then learn how to go out and start having quality customer conversations," says Hammond.

But if an MSP lacks vision and clarity around market trends and is more focused on using price to win new clients, it may be hesitant to make investments in newer types of security technologies, because it feels customers won't pay for them, she adds.

Hammond believes that trying to get customers onboard before they can expand the business is an incredibly risk-averse kind of mindset. MSPs struggle with discussing risk with their customers and positioning the value and benefits an advanced security offering will bring to their organisation.

"Instead of dealing with the pushback head-on, they will accept the customer's response of 'I don't need that' or 'I won't pay for that' and permit them to remain with the status quo," she says.

They could be sacrificing monthly recurring revenue and increasing the amount of risk the customer transfers over to them, "all because the MSP was worried that if it pushed for [risk], it would end up losing the client and the monthly revenue they were generating".

## Caution vs optimism

On the issue of whether caution is the better part of valour, Innes Muir, regional manager for MSSPs, UK, EIRE and RoW at Logpoint, says: "Nobody gets fired for buying the leading vendor solution, and there's a reason for that: confidence. For the partner looking to add a new solution to the portfolio, key concerns are: is it robust, does it do what it says on the tin, and is it going to integrate with the customer's infrastructure?"

But new entrants can steal a march on dominant players by building effective relationships with partners and winning them over. "Partners are not about to share their crown jewels, aka the customer base, without some concrete assurances that the solution will meet their expectations," says Muir.

The current economic situation is influencing the willingness of channel businesses to take risks. Budgets are tight and partners

are erring on the side of caution because they "don't want to upset or risk losing the goodwill of their customers, not least because there are plenty of rivals out there looking to jump in" says Muir, adding: "Whether customers and their partners are in a position to invest in something new right now, given that the market seems to be holding its breath, seems unlikely, meaning there will be few making brave decisions at the moment."

Perhaps many channel companies are content to stay the same size because they are confident they can support their customers the way they are?

"A partner will always work within their comfort zone, whether that is a specific vertical market or the size of customer they target. It's their bread and butter," Muir says, adding that they are not risk averse when it comes to keeping up with the competition, however. "Reflecting demand and keeping pace with the competition are the key channel drivers today, and it's why we're seeing a renewed focus on service propositions."

> **"Reflecting demand and keeping pace with the competition are the key channel drivers today"**
>
> Innes Muir, Logpoint

Teague agrees that recent global, macro-economic scenarios – such as the Covid-19 pandemic and supply chain issues – may have driven business leaders towards caution over optimism. He says that he understands and respects this approach at a moment in time when leaders "perhaps pivot slightly from aspiration and focus on business security and stability", adding: "However, as Covid-19 becomes more of a distant memory and the global geo-political landscape settles, I believe we will see an unwinding of this approach."

Perhaps partners are happy to stay the same size because they have reached a point of maturity where they can get along very nicely, assured that they will be needed by vendors to help deliver changes at the right time and with the least amount of risk possible.

Teague says: "I believe there is a lot of truth in the comment that business leaders of channel companies want to control growth based on customer experience and don't want to grow too fast and negatively affect quality. I'm almost certain this is true of most businesses in the channel, and again a philosophy I agree with."

But there are other challenges to growth, such as new customer acquisition, market conditions, quality and quantity of available talent and changes in technology economic models. "I believe most business leaders in the channel are looking for growth, but perhaps are adopting the principle of not wanting growth at any cost," Teague says. "If they cannot achieve it to the overall betterment of the business, they will maintain their status quo until they believe it's the right time with the right market conditions to make a push for growth."

Is that being risk averse or is it just being savvy? Whatever it is, it's hard to argue that it's wrong. Maybe the 77% who don't have a high risk tolerance might have a point after all. ■

# Karin Pike Okta

*The latest industry figure to share some personal insights is the director of channel partners and alliances for Northern Europe at Okta*

## Morning Karin, tell us a bit about your job

I am the director of channel partners and alliances, Northern Europe, at Okta. My day-to-day job is to work with our partners to grow and build their Okta practices.

## Why are you the right person for this job?

I love building relationships, and really enjoy working with people to make them successful. I also find it immensely satisfying bringing groups of people together to drive towards a common goal. Why does that make me the right person for the job? I think in any channel team, you have to constantly work hard to build external relationships that make partners feel part of your company. You need them to feel like a valued extension of your organisation.

## What gets you up in the morning?

An exciting job. A challenging job. Working with external people as though they are part of your own business is rewarding, but can be complex. I find the idea of tackling that challenge to be very motivating. Partners have their own business drivers and their own business plans. They also sometimes work with competitors, so people like me have to put in the extra work to keep them focused on Okta, identity and the opportunity we have together. I love waking up in the morning with that focus in mind, doing my best to keep Okta in the front of their thinking.

## Who helped you get to where you are today?

I'm fortunate to have spent many years at IBM. During this time, I had the

HOME

opportunity to move into different fields such as business process management (BPM), service-oriented architecture (SOA), content management, case management, artificial intelligence (AI) and data science. That gave me the chance to explore different aspects of IT and get that broader understanding of the industry that I rely on now. I started my sales career working for a company that sold IBM-compatible hardware and joined IBM through acquisition. Prior to IBM, I worked for an enterprise resource planning (ERP) vendor.

## What is the best or worst business advice you have received and from whom?

The best advice was given to me by my very first sales manager when I was a rookie seller. I know, I'm going back many years! He told me that you should always be true to yourself, and do what you believe in, because if you don't do something you believe in, how will others believe in you?

I still think about that advice a lot. I always treat partners as customers. And sometimes I will go against the grain and fight for those people even when I know it's against usual advice or a conventional way of doing things. I don't ever do this on a whim – I always explain reasons why I don't agree with something when it doesn't feel right – this really helps my long-term partner relationships. It might not provide an immediate short-term win, but it helps build that trust, and those relationships are the most important capital in the long run.

> "The advice I'd give to anyone starting out today in IT is to be humble but never apologise. You're here because people believe in you, so take confidence in that"
>
> Karin Pike, Okta

## What advice would you give to someone starting out today in IT?

Be humble but never apologise. You're here because people believe in you, so take confidence in that, and feel like you have the space to be yourself.

## Is it possible to get through an industry conversation without mentioning 'digital transformation'?

Never!

## What do the next five years hold for the channel?

From Okta's perspective, we're in a brilliant position to make the most of the next five years. Okta is one of the most partner-first-focused organisations I've ever worked for, and that is going to stand us in great stead.

We've got an incredible product. We are very focused on the partners we are choosing, and investing in those partners appropriately. We've also got the executive buy-in that we are

a truly partner-centric organisation. All of these strengths combined will help our business explode.

## Tell us something most people do not know about you

I was given a spa day voucher as a gift. By chance, I went to the same spa hotel where the England rugby team were staying. I ended up sharing a sauna and jacuzzi with some of the team, which was quite interesting as I'm a mad rugby fan.

## What goal do you have to achieve before you die?

I'd really like to go and climb a mountain in South America. Machu Picchu, or something similar. I've never been and it's always been a dream of mine. I've got two knee replacements so I want to challenge myself to go climb a mountain and see if I can get to the top.

## What is the best book you've ever read?

Siya Kolisi's memoir. I'm absolutely mad about sport and I read his autobiography. Discovering where he came from and where he ended up, as possibly one of the most successful Springbok rugby captains of all time, was just phenomenal. He came from nowhere.

## And the worst film you've ever seen?

*Jaws* gave me a lifetime fear of sharks.

## What would be your Desert Island MP3s?

Anything by Fleetwood Mac or *Lady in black* by Uriah Heap.

PIXOME/ADOBE

Karin Pike, Okta: "Watching *Jaws* gave me a lifetime fear of sharks"

## What temptation can you not resist?

A good glass of red wine.

## What was your first car and how does it compare with what you drive now?

My first car was a tiny little student car. It was bright yellow, and I hate yellow. I drive something much nicer now, with my wonderful dogs in the back and the sunroof down.

## Who would you least like to be stuck in a lift with?

My father-in-law.

## If you could be any animal for a day, what would you be and why?

A dog. They give unconditional love and are great companions.

## If you were facing awesome peril and impossible odds, which real or fictional person would you most want on your side and why?

Superman. He's ready for anything.

## And finally, a grizzly bear and a silverback gorilla are getting ready for a no-holds-barred rumble. Who is your money on and why?

The gorilla. They're smart. Bears are too narrow-minded. I know bears have claws and they could try to scrappily fight their way to victory, but a silverback would outsmart them. They have that different way of thinking. ■


Karin Pike, Okta: "One temptation I can't resist is a good glass of red wine"