



Best Practices in an ever-changing environment

March 2020

SBI IS A MANAGEMENT CONSULTING FIRM SPECIALIZING IN REVENUE GROWTH.

It's difficult to grow revenue faster than your industry's growth rate and faster than your competitors.

SBI's Revenue Growth Methodology allows you to accelerate your rate of revenue growth.

It does this by getting the functional strategies of customer experience, sales, marketing, product management, pricing, customer success, and human resources into alignment with the CEO's go-to-market strategy and the external marketplace.

REVENUE GROWTH METHODOLOGY



Go-To-Market Strategy



Customer Experience



Marketing Strategy



Segmentation Strategy



Product Strategy



Sales strategy



Talent Strategy



Pricing Strategy



Customer Success

WE'RE NOT TYPICAL

Here's how we're different



We're specialists, not generalists

You can be good enough at all things, or great at a few. We choose the latter. We're hyper focused on doing what we do well: helping clients increase their revenue faster than the market and their competition.



We're consultants by choice, not by trade

We staff projects with senior-level executives and former heads of sales and marketing who have real-world experience. After finding success, they've decided to focus their attention on helping others and sharing the lessons they've learned.



We use an agile methodology

Our delivery methodology involves getting to a working prototype very quickly and then rapidly iterating from this to a finished solution, we offer a much faster cycle time from problem identification to problem resolution.



We focus on what matters: You

30% to 50% of every SBI employee's compensation package is tied to a bonus that is entirely based on client feedback and overall happiness. That means they literally get paid to make sure you're happy, which naturally fosters client intimacy.

The Revenue Growth Methodology

How Market Leaders Accelerate Revenue Growth

SBI's Revenue Growth Methodology brings the functional strategies into alignment with the CEO's go-to-market strategy and the external marketplace.



Go-to-market

Determine how you will serve customers, the objectives you must achieve, the markets you will compete in, the competition you will face, and how you will win.



Segmentation

Provide data-driven external context to enable your leadership team to make smarter decisions on how to allocate their resources – people, money and time.



Talent

Assess, recruit, onboard, develop, and retain a team of top producing people across the entire go-to-market engine.



CX Design

The experience of providing a solution to the customer is as remarkable as the outcome desired from the solution itself.



Product

Make investments in products and services that result in solutions that are in high demand that buyers are eager to purchase



Pricing

Create price positioning, structures, and levels to execute a value-based pricing strategy that will maximize your revenues.



Marketing

Drive demand in the marketplace for your company's products and services.



Sales

Turn market demand into revenue by allocating sales resources effectively to drive revenues up and selling costs down.



Customer Success

Allocate Customer Success resources efficiently to increase revenue retention and increase revenue from existing customers.

Functional Go-to-market Interlock

Unified strategic direction

Experience Design

Happy Employees & Customers

Solution Development

Profitable Innovation

The Go-to-market "Last Mile"

Revenue Growth Through Sales & Marketing Excellence

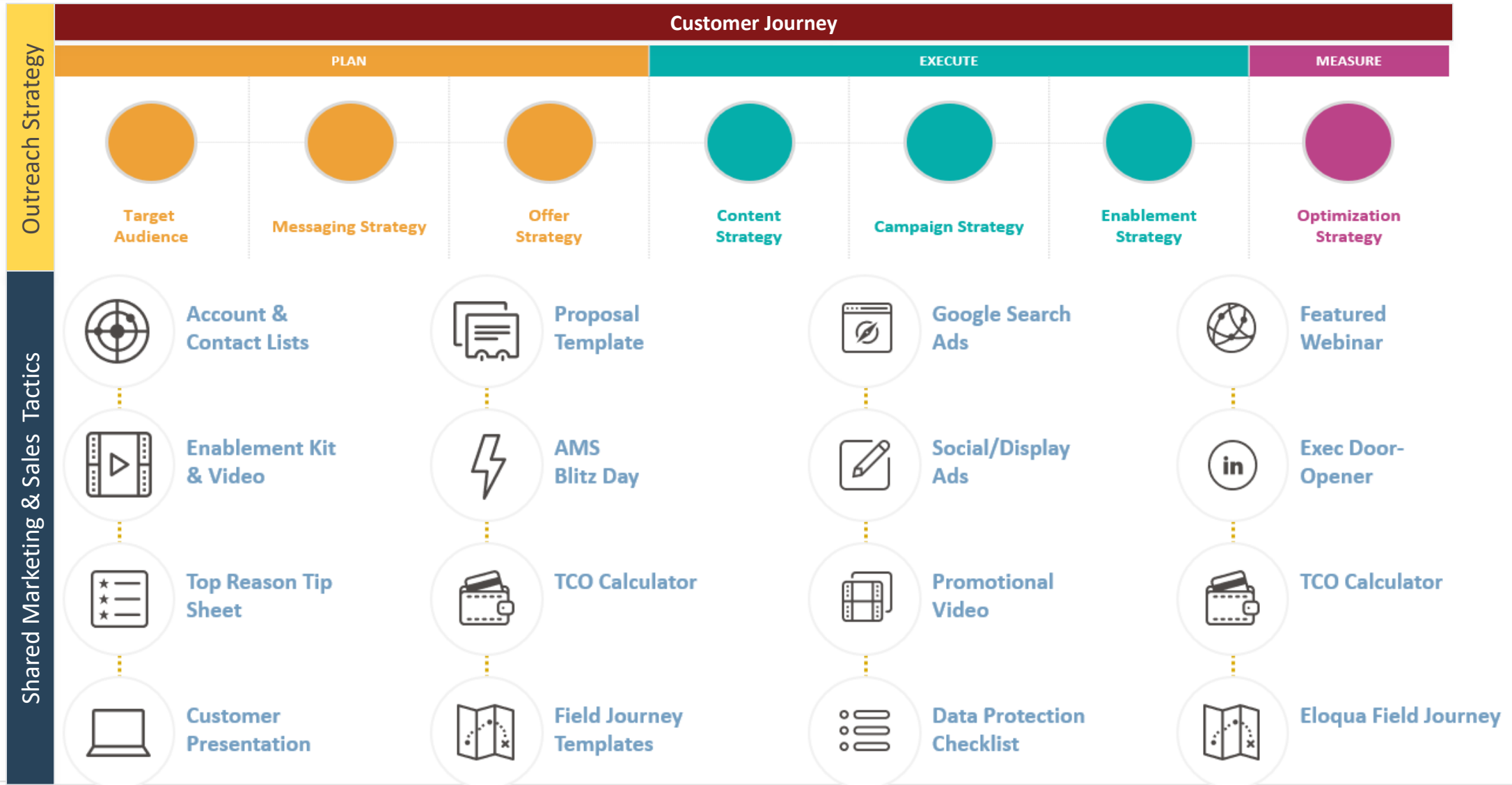
HOW TO MAKE YOUR NUMBER IN A CORONA VIRUS WORLD

Step 1	2	3	4	5	6	7
Re-Set the Fact Base: Forecasting	Connect Your Community	Selling Through Social Distancing	Deal Triage	GtM Execution Plan	Channel Mix & Coverage	Evaluate the Metrics & Incentives
Re-Set the Revenue Plan, Re-Allocate the Budget, and Manage Expectations	Create empathetic messages that reassure your audiences	Focus on phone and virtual sales enablement	Focus on later stage deals and quickly intervene as necessary	Revise the Go to Market Strategy & Execution Plan	Assess Channel Mix and Update Sales Coverage	Align metrics and incentives for new GtM
<ol style="list-style-type: none"> 1. Model impacts to the forecast, scenario model 2. Re-allocate budget from events, travel, etc.. and to (new) revenue drivers 3. Develop effective communication plan & key messages for the Board 4. Bring in senior leadership and develop “speak as one” strategy 5. Create task force to lead this effort 	<ol style="list-style-type: none"> 1. Ensure the physical and psychological safety of your team. 2. Adjust your content calendar 3. Initiate key communications to: Customers, Partners, Sellers, Employees 4. Connect customers to one another and build/enhance your community 	<ol style="list-style-type: none"> 1. Increase training for selling through phone & virtual channels 2. Consider shifting field sellers to inside team 3. Develop new & Covid-relevant key messages, win themes, value propositions, etc., 4. Digitally enable your Go-to-Market motions 	<ol style="list-style-type: none"> 1. Stand-up deal desk SWAT team and/or enhance existing DD 2. Establish feedback loop between DD and segmentation (customer intelligence) team 3. Consider pricing adjustments (plus or minus) based on forecasting & segmentation (willingness to pay) 	<ol style="list-style-type: none"> 1. Implement Covid-19 Segmentation 2. Revise GtM strategy based on revised segmentation 3. Feed segmentation analysis to DD Swat team 4. Develop 30-60-90 Day GtM Execution Plan and GO 	<ol style="list-style-type: none"> 1. Leverage Covid-19 Segmentation to re-balance field, partner, phone, digital, self-serve mix 2. Prescriptively, re-allocate field seller time due to travel reductions 3. Determine what to do with specialist and overlay roles 	<ol style="list-style-type: none"> 1. Deploy KPIs throughout organization 2. Optimize Territories to address best markets 3. Align Quotas to the new reality 4. Adjust Compensation Plans to retain your best people

Areas to Explore Today

1. Opportunity identification and progression in a digital environment
2. Best practices around digital engagement both for employees and clients
3. Tools and resources to understand what other similar firms are working with
4. Resource allocation between sales and service during prolonged periods of disruption

1. Opportunity identification and progression in a digital environment



2. Best practices around digital engagement both for employees and clients

Best Practices

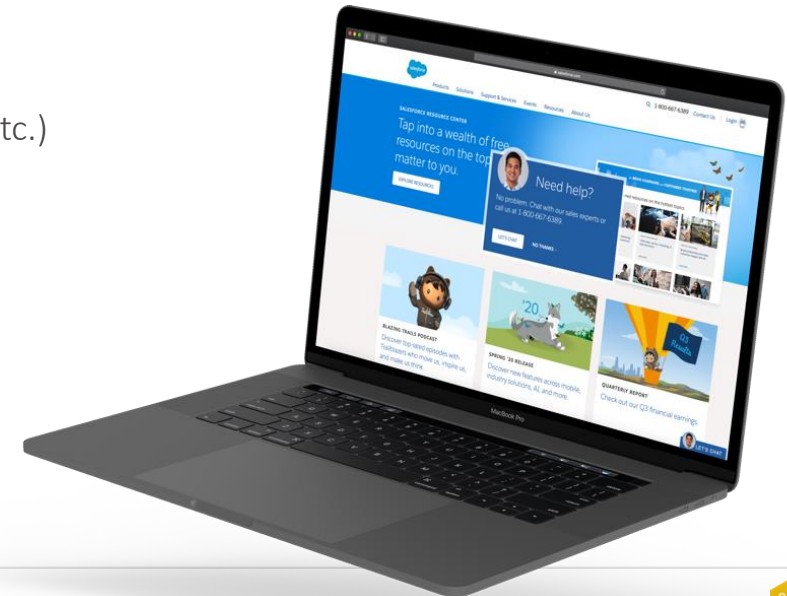
- Keep team focused on right process before over waiting to technology
- Use the most intimate communication channel. Progression- Video, phone, text, email.
- Setup and incent usage of internal collaboration tools to drive sharing and camaraderie
- Enablement platform to drive the right activities and enable usage of the right content
- Clarity on CRM expectations to ensure visibility is where it needs to be

Technology needs to be leveraged for both efficiency and effectiveness with the shift

Sales and Marketing leaders have a lot of technology that is already in place

Leader Checklist:

- ☐ Laptops- and/or company approved hardware and access (computers, monitors, VPN access, client access, etc.)
- ☐ IT security and network bandwidth reviewed
- ☐ Cell phone/headset- with call forwarding of office line(s)
- ☐ IVR/ACD- re-routing to worker cell phones vs. land line in office- 'follow the sun'
- ☐ Redundant internet access identified- hot spot or phone tethering
- ☐ Video conference capability- For internal and external calls
- ☐ Call coaching technology- ability to record, listen and coach, whether live or using recording system



3. Tools and resources to understand what other similar firms are working with

Enablement Techniques & Resources

- Create prescriptive content with new messaging and playbooks
- Setup community sharing for employees and customers
- Different communication cadence- more often, agile approach, focus on stucks
- Have a virtual “war room” that leaders use to collaborate, manage, plan, etc.
- Shift coaching cadence and approach



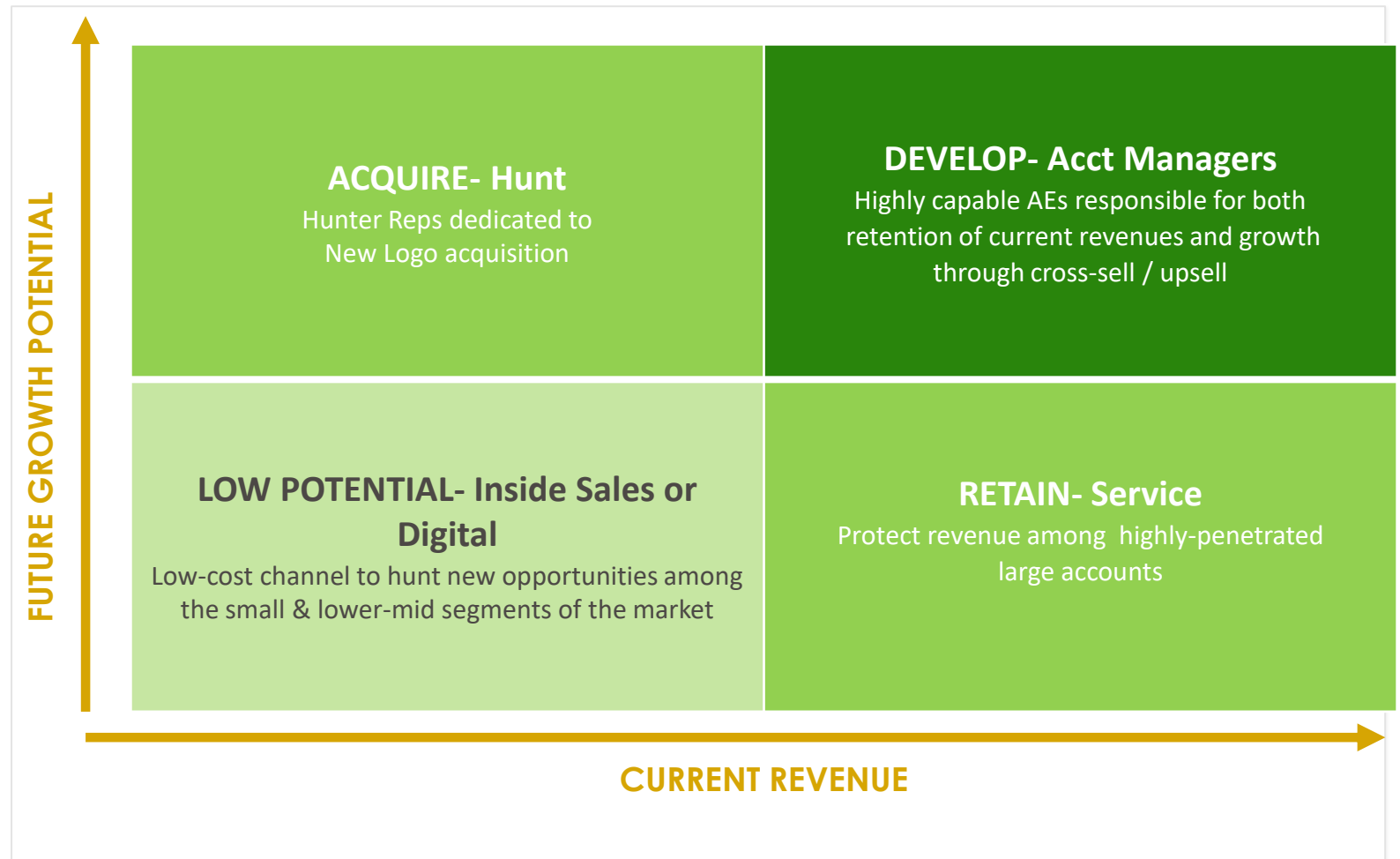
Virtual Coaching of their team(s)

Leaders Checklist:

- ☐ Video conference calls to do team and 1:1 calls- **turn on cameras**
- ☐ Leverage coaching technology to give feedback on calls, screen monitoring technology
- ☐ Use new coaching cadence to add to ensure individuals don't feel “isolated”
 - ☐ Daily huddles, weekly huddles
 - ☐ Take time on huddles to have each person “check in” on how they are doing
- ☐ 1:1 calls should have structure
- ☐ Minimize email, use phone, video, collaboration planforms to work

4. Resource allocation between sales and service during prolonged periods of disruption

1. Re-evaluate market conditions and product market fit
2. Determine talent gaps
3. Identify resources that could temporarily move into different roles to best support clients through next 30 days
4. Determine the top risk factors in the plan (key clients / prospects, customer success / renewals, etc.)
5. Adjust your revenue plan to the new market
6. Adjust coverage based on the 2x2 and how it aligns to the revenue plan
7. Enable and support proper execution
8. Measure KPIs and future internal moves needed to support clients



The background of the slide is a light gray with a complex, abstract pattern. It features several curved, overlapping bands that create a sense of depth and movement. Overlaid on these bands is a grid of thin, white lines, which is slightly offset and semi-transparent, giving it a layered appearance. The overall effect is modern and architectural.

Appendix

How Does SBI Help Companies Grow Revenue?

Phase 0



Rapid Diagnostic, Develop Fact Base, & Prioritization

A Diagnostic will primarily consist of research and analysis to determine how the company compares to KPIs and best practices. SBI will provide a critical perspective on GTM strengths & weaknesses. This analysis will culminate in a clear set of prioritized actions the company should take to accelerate revenue growth and/or improve capital efficiency.

Phase 1



Revenue Growth Acceleration

Value is created by **strategic implementation of SBI's Revenue Growth Methodology**. Based on the output of phase 0, certain initiatives will be prioritized and executed on. This will be a collaborative effort between SBI & the client to ensure ownership is transferred the client realizes the expected results.

Phase 2



Ad-Hoc Execution Support & Advisory Services

SBI provides ongoing advice, data, benchmarks, tools, and content to help your team execute on growth initiatives so the results are realized. This support helps companies accelerate implementation and avoid common pitfalls.

SBI examples to create value by investing in sales & marketing for growth

1. Revenue Growth Acceleration

Recommended Approach



Perform Segmentation to Identify Key Growth Areas

Segment out the market to better understand which accounts and prospects have the highest propensity to drive revenue



Develop Strategy to Capture Growth

Align the organization to capture the growth available from high growth segments. Optimize key elements of the sales and marketing functions and identify opportunities to deliver on expected revenue expectations



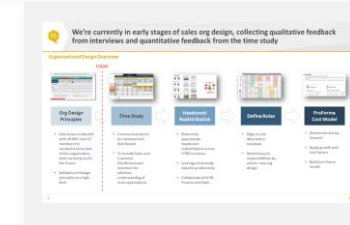
Execute against the Strategy

Ensure the organization is enabled and able to execute against strategic priorities

Critical Solution Components



Market, Purchase, and Buyer Segmentation



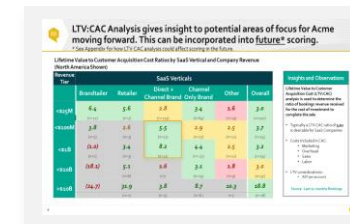
Organizational Structure



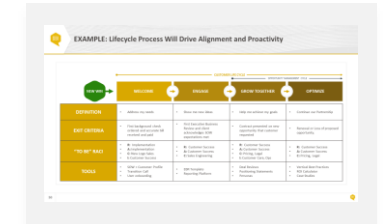
Marketing Campaign & Execution



ICP & Development of Buyer Personas



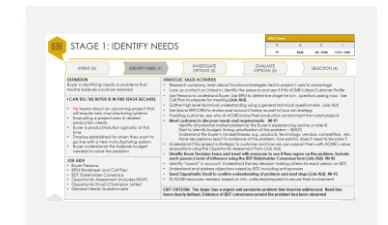
Routes to Market



Customer Success Optimization



Improve Sales Enablement



Optimize Sales Process

SBI'S Examples of How To Create Value Through Margin Expansion

1. Revenue Growth Acceleration

Recommended Approach

Evaluate Pricing Strategy

Evaluate the receptiveness of the market to pricing changes. If the full customer willingness to pay is untapped, increase pricing for SaaS modules to include services.

Stand Up Customer Success Team

Repurpose the services team as a Customer Success team. The headcount expense now falls under S&M vs. COGs. Gross Margins rise, CAC payback period declines, and overall ASP increase.

Ensure Sales/ Marketing Execution

Ensure alignment of the sales and marketing motions with the margin expansion strategy including:

- Value messaging
- Marketing campaigns
- Sales Enablement
- Sales Execution

Critical Solution Components



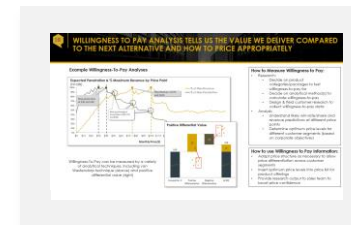
Pricing Analysis



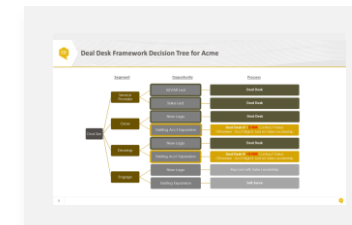
CS organizational adjustment



Marketing Execution



Willingness to Pay (WTP) Study



Pricing Analysis



Sales Execution

Examples of How To Achieve Value By Maintaining Growth With Less S&M Spend

1. Revenue Growth Acceleration

Recommended Approach

Perform Rapid Diagnostic

Perform rapid diagnostic to understand areas of spend where higher ROI is possible. Leverage benchmarks to project possible outcomes from cost rationalization

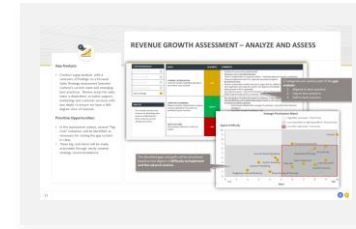
Reduce S+M Spend Within Targeted Areas

Strategically reduce spend in areas uncovered through rapid assessment. Develop risk mitigation plans to overcome any execution challenges

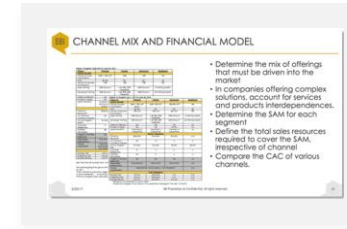
Measure Revenue and Cost Impacts

Analyze the impact of S&M spend reduction to better understand impact on revenue

Critical Solution Components



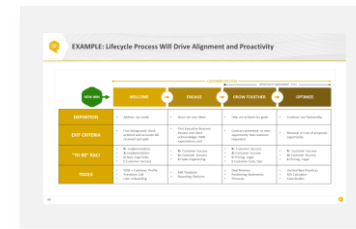
Rapid Assessment



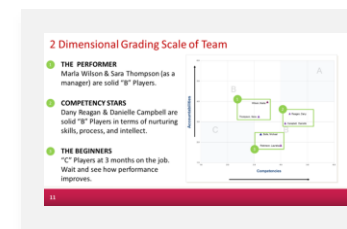
Channel Cost Analysis



Return of Marketing Investment



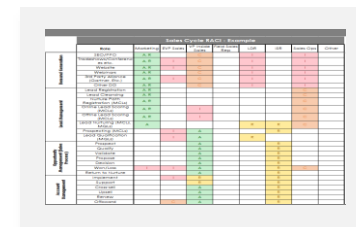
Customer Success Optimization



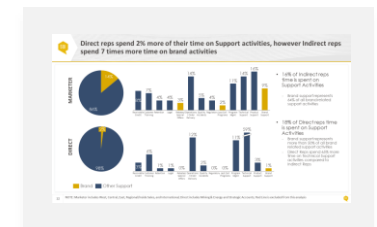
Talent Assessment



Marketing Campaign Design



Organizational Design



Sales Productivity and Time Allocation