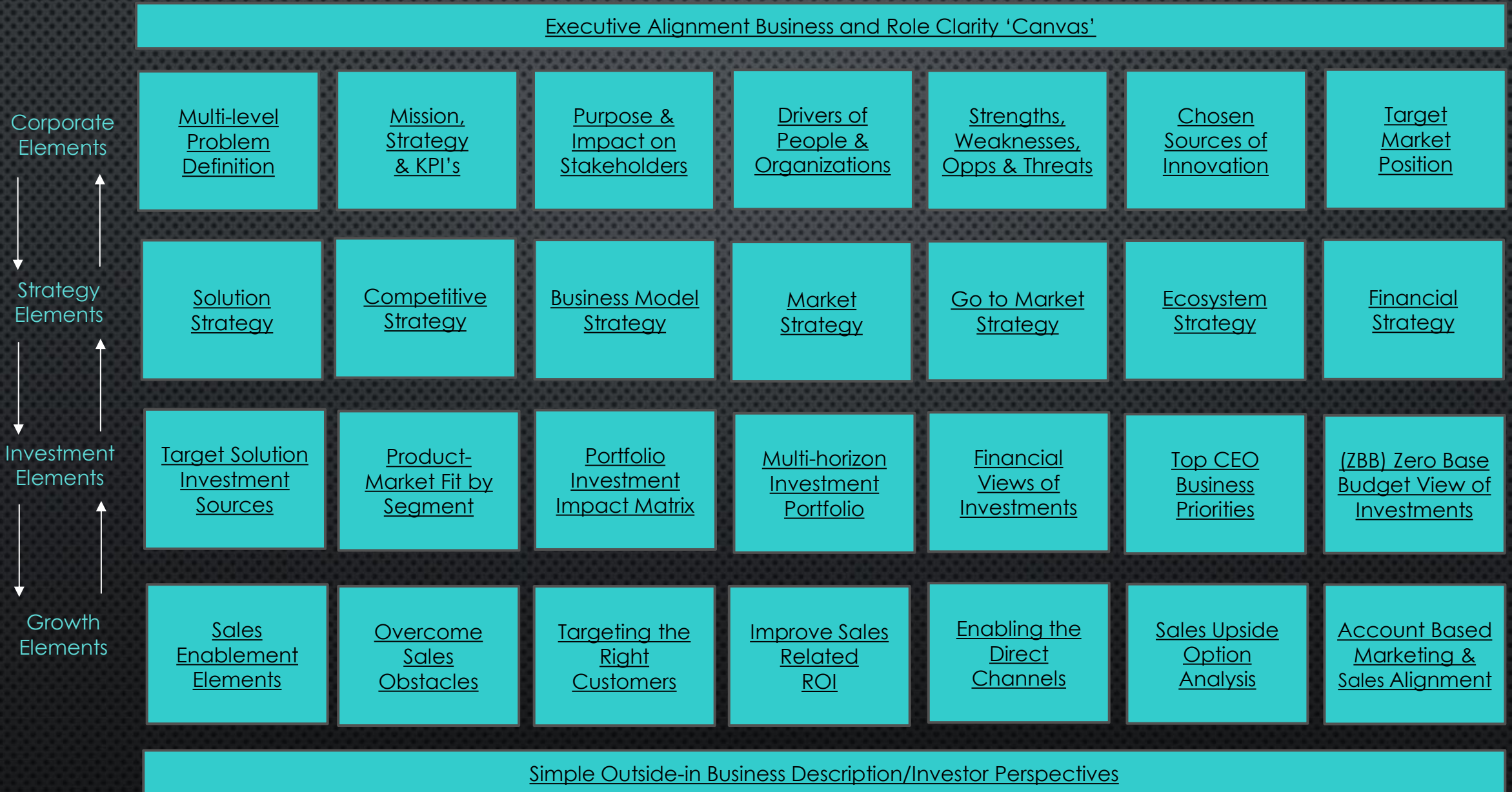


# Perspective Expanding Frameworks for Go-To Leaders

USE WITH YOUR TEAMS TO OPEN MINDS, CONNECT NEW DOTS,  
ENCOURAGE NEW IDEAS, GAIN ALIGNMENT IN A COMMON CONTEXT

# TILES: Click on any Topic to Link to a Perspective Expander



# MULTI-LAYER PROBLEM DEFINITION

Expand Perspectives  
- problem your customers have



## Customer Problem

consectetur adipiscing elit, sed diam nonummy nibh euismod tincidunt ut laoreet dolore magna aliquam erat volutpat.



## Who Owns the Problem?

- Iskfjsdfjdsfjsdfjksd
- lkfdjlsdfjsdfjlsdf
- lsdkfjlsdfjlsdfjlsdf
- ldjkfjsdfjlsdfjlsdf



## Obstacles and Constraints?

- Iskfjsdfjdsfjsdfjksd
- lkfdjlsdfjsdfjlsdf
- lsdkfjlsdfjlsdfjlsdf
- ldjkfjsdfjlsdfjlsdf



## Why is it a 'Big Rock'?

- Iskfjsdfjdsfjsdfjksd
- lkfdjlsdfjsdfjlsdf
- lsdkfjlsdfjlsdfjlsdf
- ldjkfjsdfjlsdfjlsdf



## Value of Solving Problem?

- Iskfjsdfjdsfjsdfjksd
- lkfdjlsdfjsdfjlsdf
- lsdkfjlsdfjlsdfjlsdf
- ldjkfjsdfjlsdfjlsdf



## Why Solve it Now?

consectetur adipiscing elit, sed diam nonummy nibh euismod tincidunt ut laoreet dolore magna aliquam erat volutpat.



## Why isn't it "Nice to Have"?

- Iskfjsdfjdsfjsdfjksd
- lkfdjlsdfjsdfjlsdf
- lsdkfjlsdfjlsdfjlsdf
- ldjkfjsdfjlsdfjlsdf



## What's the Spend Today?

- Iskfjsdfjdsfjsdfjksd
- lkfdjlsdfjsdfjlsdf
- lsdkfjlsdfjlsdfjlsdf
- ldjkfjsdfjlsdfjlsdf



## Is it "Budget Worthy"?

- Iskfjsdfjdsfjsdfjksd
- lkfdjlsdfjsdfjlsdf
- lsdkfjlsdfjlsdfjlsdf
- ldjkfjsdfjlsdfjlsdf

# MISSION, STRATEGY & KPI'S (BALANCED SCORECARD)

Expand Perspectives  
- corporate goals and targets

Mission

.....

Vision

.....

Strategy

.....

Values

.....

## Key Performance Indicators

Financial

Investment\_\_\_\_\_ Revenue Growth\_\_\_\_\_ Expense Management\_\_\_\_\_

Product

Functionality\_\_\_\_\_ Maturity \_\_\_\_\_ Quality\_\_\_\_\_

Customer

Adoption\_\_\_\_\_ Value \_\_\_\_\_ Satisfaction\_\_\_\_\_ Retention\_\_\_\_\_ Expansion\_\_\_\_\_

Process

Productivity\_\_\_\_\_ Efficiency \_\_\_\_\_ Schedule\_\_\_\_\_ Quality\_\_\_\_\_

People

Alignment\_\_\_\_\_ Leadership\_\_\_\_\_ Skills\_\_\_\_\_ Engagement \_\_\_\_\_ Retention \_\_\_\_\_

# STAKEHOLDERS PURPOSE AND IMPACT

Expand Perspectives  
- stakeholder care-about

## Stakeholders

## Purpose & Target Impact

Shareholders

.....  
.....

Customers

.....  
.....

Employees

.....  
.....

Industry

.....  
.....

Society

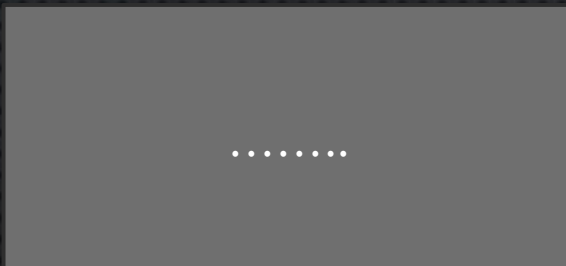
.....  
.....

# PEOPLE & ORGANIZATIONS

Expand Perspectives  
- range of employee needs

## Drivers Of Employee Success

### Values



Leadership  
Effectiveness  
& Alignment

- Purpose
- Growth
- Empowerment
- Flexibility
- Execution
- Accountability
- Competency
- Trust & Transparency
- Psychological Safety

- Yes or No?
- Yes or No?
- Yes or No?
- Yes or No?
- Yes or No?
- Yes or No?
- Yes or No?
- Yes or No?
- Yes or No?
- Yes or No?

### Key Performance Indicators

### People

Leadership\_\_\_\_\_ Skills\_\_\_\_\_ Engagement \_\_\_\_\_ Retention\_\_\_\_\_

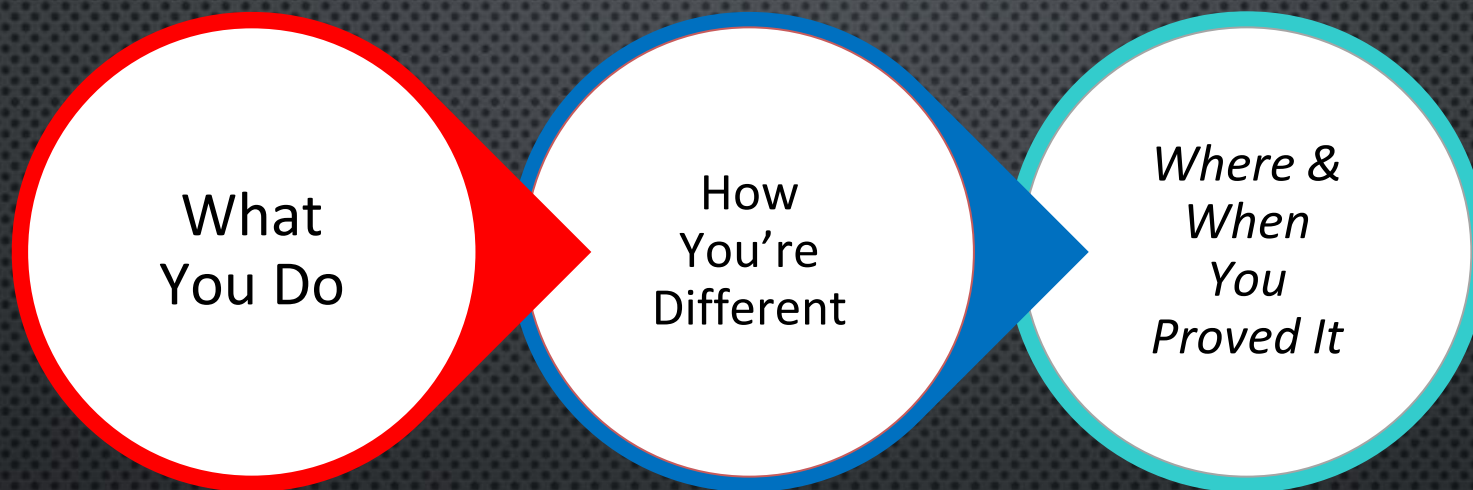






# DESIRED MARKET POSITION

Expand Perspectives  
- what makes you so valuable & unique



**Your Unique  
Market  
Position  
HERE**

Problem? Solution?

- 
- 
- 
- 

Firsts? Innovations?

- 
- 
- 
- 

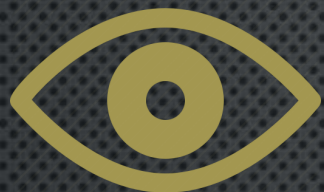
Influencers? Credibility?

- 
- 
- 
- 

- 
- 
-

# SOLUTION STRATEGY

Expand Perspectives  
- what you actually offer customers



## WHAT YOU DO

What you offer and what you solve



## HOW YOU DO IT

Your approach to solve the problems



## WHY YOU DO IT

Your impact on Customers (value)

Your Sustainable Advantage



### 'Only You' ....



- Architecture?
- Firsts?
- Innovations?
- Competitive Barriers?



# BUSINESS MODEL STRATEGY

Expand Perspectives  
- how you operate as a business

How do you 'scale' the business to large numbers of customers?  
(e.g., ease of adoption, low support, self-service, chatbots, on line sales, etc.)

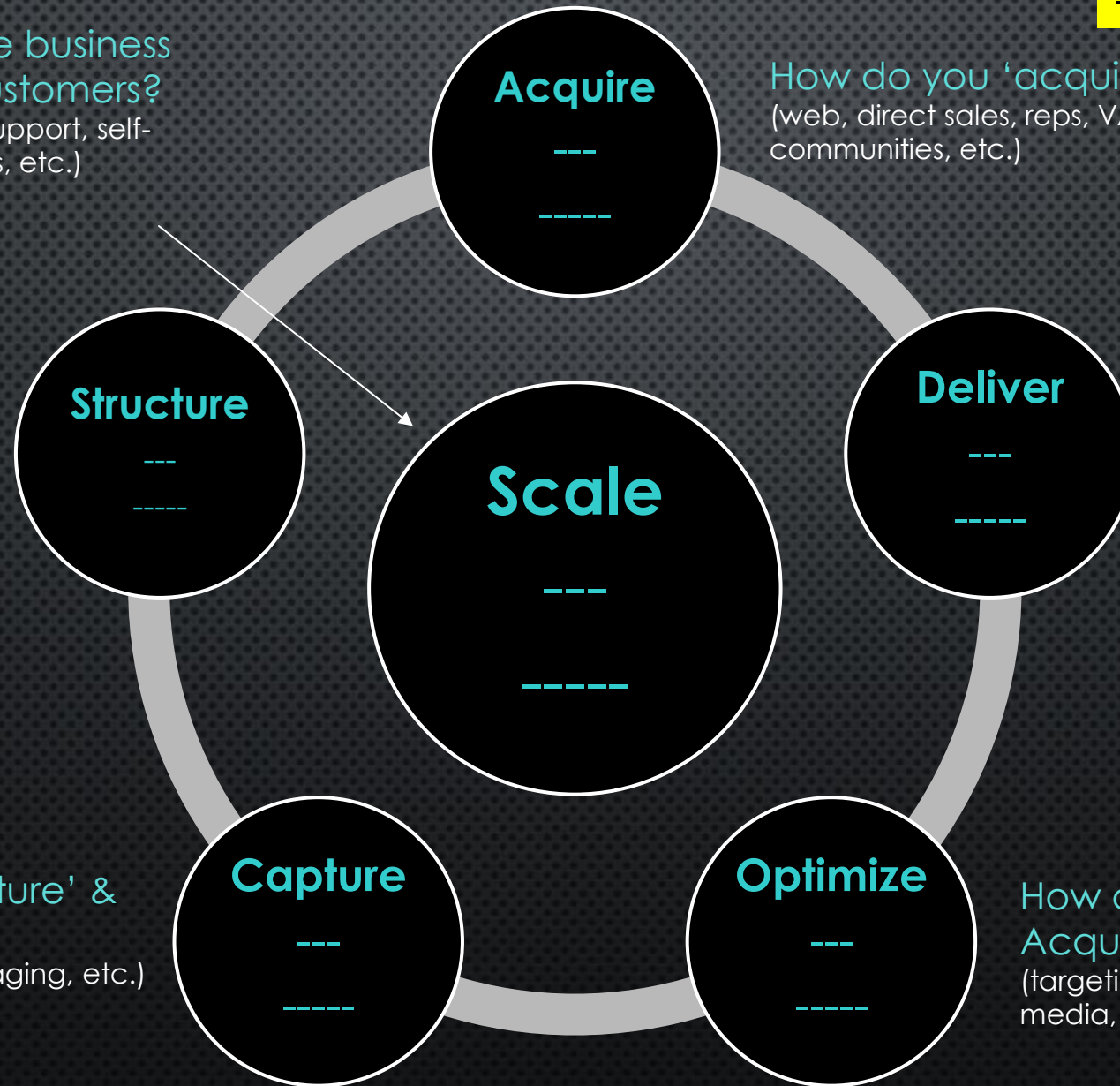
How do you 'acquire' customers?  
(web, direct sales, reps, VARs, ads, events, communities, etc.)

How do you 'structure' your Business model?  
(e.g, freemium+ads, subscriptions, etc.)

How do you 'deliver' your product or service?  
(e.g cloud, apps, VARs, partners, consultants, etc.)

How do you 'capture' & monetize value?  
(e.g., tiered subs, packaging, etc.)

How do you 'optimize' Cost of Acquisition (CAC)?  
(targeting, partners, word of mouth, free social media, repeat orders, etc.)



# MARKET STRATEGY

Expand Perspectives  
- which markets and when

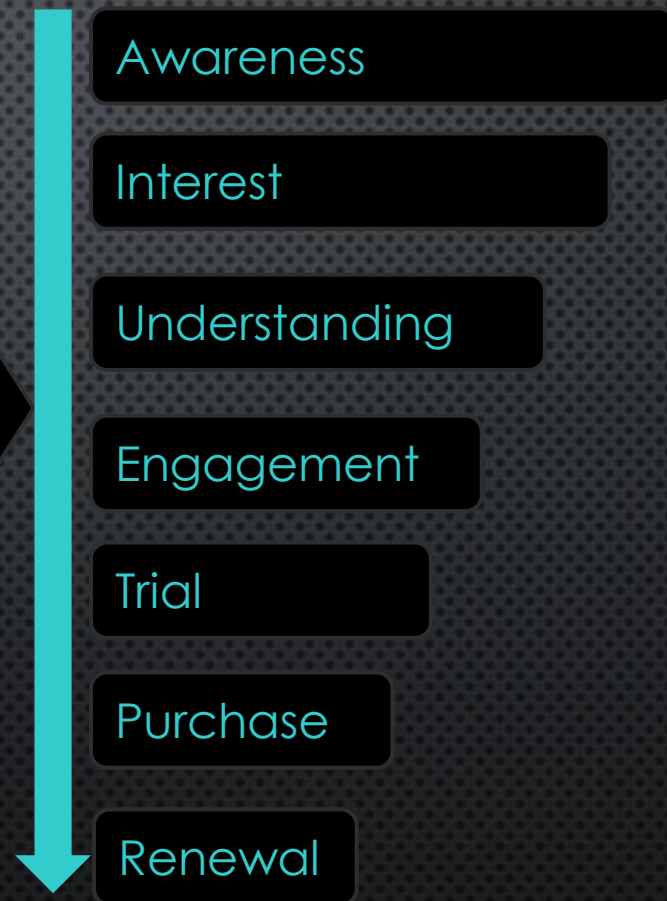


# GO TO MARKET STRATEGY

Expand Perspectives  
- how you reach & convert customers

<b>Who to Target</b> Customer Segments Influencers Partners Competitors Standards Bodies Etc.	<b>Via What Channels</b> Web & Social Media Press and Publications Digital Marketing & Events Sales and Reps VARs and Partners Etc.
<b>With What to Offer</b> Packaging Pricing Integrations Methodologies Services Etc.	<b>With What Content</b> Thought Leadership Product Descriptions Value w/ Case Studies References Demos & Webinars Etc.

Driving



- Metrics?**
- Acquisition cost (CAC)
  - Cost per lead (CPL)
  - Conversion rate
  - Total conversions
  - Click-through rate (CTR)
  - Website visitors
  - Bounce rate
  - Page views
  - Landing page performance
  - Session duration
  - Engagement rate
  - Likes & Comments
  - Shares
  - Number of subscribers
  - Keyword position
  - Top queries by click
  - Keyword position change
  - Etc.

How will you drive scalable awareness through renewal?

- Iskflsdfjdsflfjsdlfjksd
- Ikfdjlsdfjsdlfjsdlfjlsdf
- Isdkfjlsdfjlsdfjlsdjflsdf
- Idjkflsdfjlsdfjlsdjflsdfjlsdjf

What's your 'multiplier' strategy to efficiently scale?

# B2B VERSUS B2C GO TO MARKET DIFFERENCES

Expand Perspectives  
- on using B2B vs B2C techniques

## B2B Sales & Marketing

### B2B Customers

- Professionals
- Multiple Stakeholders
- Small Focused Segments

### B2B Marketing

- Business Impact
- Lead Generation
- Education/Webinars
- Account References
- Awareness/Events
- Whitepapers
- Thought Leadership
- Business Influencers

### B2B Sales

- Consultative
- Solutions Focus
- Relationship Based
- Long Lead Times

## B2C Sales & Marketing

### B2C Customers

- Individuals
- Families
- Large Segments

### B2C Marketing

- Emotional
- Brand Focused
- Comparison Sites
- On-line Reviews
- Offers/Promotions
- Social Media
- Word of Mouth
- Consumer Influencers

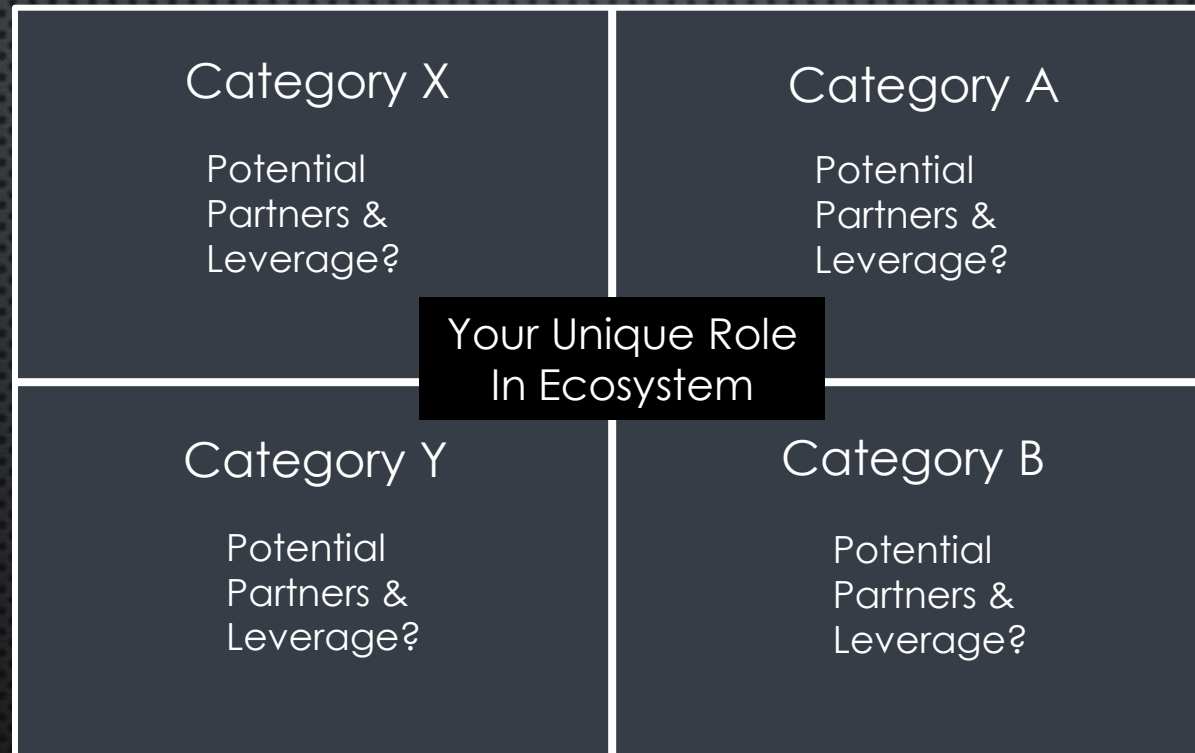
### B2C Sales

- Reach & Awareness
- Transaction Based
- Immediate Satisfaction
- Short Lead Times

As complexity in the buying process and the value of the purchase increases, the process moves to solutions and sales led.

# ECOSYSTEM STRATEGY

Expand Perspectives  
- on what partners you could work with



How Will You Leverage Key Players?

- Iskflsdfjdsfjdsfjksd
- lkfdjlsdfjdsfjdsfjlsdf
- lsdkfjlsdfjlsdfjlsdfjlsdf
- ldjkflsdfjlsdfjlsdfjlsdfjlsdf

Consider all categories

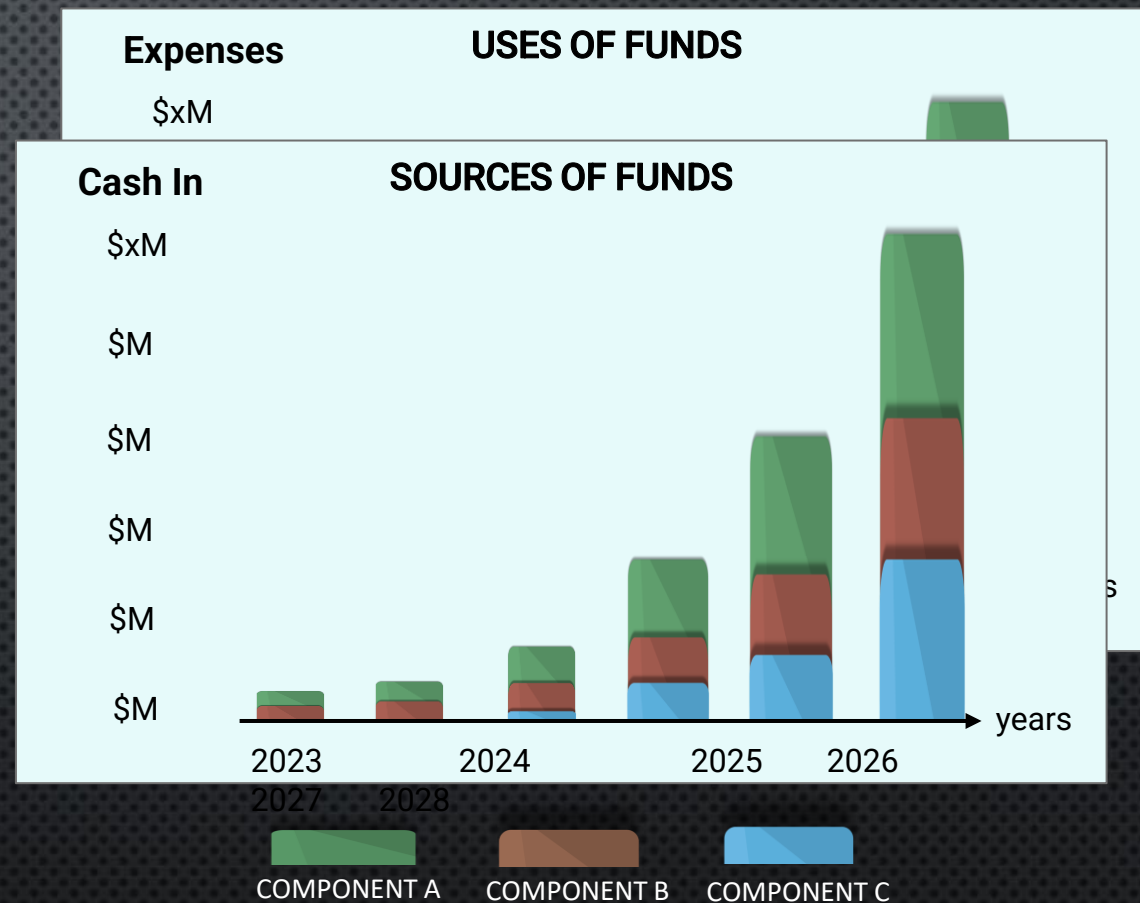
(e.g., complements, infrastructure, standards, insurance companies, service providers, VARs..)



Expand Perspectives  
- financial commits, constraints, expectations

# FINANCIAL STRATEGY

<p><b>Sources of Funds</b></p> <ul style="list-style-type: none"> <li>Product Revenue</li> <li>Services/PoCs</li> <li>Investment</li> <li>Debt</li> </ul>	<p><b>Use of Funds</b></p> <ul style="list-style-type: none"> <li>R&amp;D</li> <li>Sales</li> <li>Marketing</li> <li>G&amp;A</li> </ul>
<p><b>Growth Goals</b></p> <ul style="list-style-type: none"> <li>Revenue Ramp</li> <li>Growth Rate</li> <li>Market Share</li> </ul>	<p><b>Profitability Goals</b></p> <ul style="list-style-type: none"> <li>Burn Rate</li> <li>Break Even</li> <li>Profitability</li> </ul>



# EXECUTIVE ALIGNMENT BUSINESS CANVAS

(MODIFIED LEAN CANVAS)

Expand Perspectives  
- across all aspects of your business

<p>Problem &amp; Existing Barriers to Solve Them</p> <p>----</p> <p>-----</p> <p><a href="#">Doc link (optional)</a></p>	<p>Solution to Problem &amp; to Overcome Barriers</p> <p>----</p> <p>-----</p> <p><a href="#">Doc link (optional)</a></p>	<p>Unique Business &amp; Technical Values</p> <p>----</p> <p>-----</p> <p><a href="#">Doc link (optional)</a></p>	<p>Sustainable &amp; Unfair Advantage</p> <p>----</p> <p>-----</p> <p><a href="#">Doc link (optional)</a></p>	<p>Target Segments for Early Adoption</p> <p>----</p> <p>-----</p> <p><a href="#">Doc link (optional)</a></p>
<p>Existing Alternatives &amp; Competition</p> <p>----</p> <p>-----</p> <p><a href="#">Doc link (optional)</a></p>	<p>Key Metrics for Proof of Concept/Traction</p> <p>----</p> <p>-----</p> <p><a href="#">Doc link (optional)</a></p>	<p>How You Make Money (biz model)</p> <p>----</p> <p>-----</p> <p><a href="#">Doc link (optional)</a></p>	<p>How You 'Go to Market'</p> <p>----</p> <p>-----</p> <p><a href="#">Doc link (optional)</a></p>	<p>Segments w Repeatable Product-Market Fit</p> <p>----</p> <p>-----</p> <p><a href="#">Doc link (optional)</a></p>
<p>Cost Structure (CAC, Fixed, Variable)</p> <p>-----</p> <p>-----</p> <p><a href="#">Doc link (optional)</a></p>	<p>Target Revenue Mix (X/Y Prods, Services, PoCs %s)</p> <p>-----</p> <p>-----</p> <p><a href="#">Doc link (optional)</a></p>	<p>How You Efficiently Scale the Business</p> <p>----</p> <p>-----</p> <p><a href="#">Doc link (optional)</a></p>	<p>How You Leverage Ecosystem Players</p> <p>----</p> <p>-----</p> <p><a href="#">Doc link (optional)</a></p>	<p>Existing Obstacles to Sales &amp; Traction</p> <p>----</p> <p>-----</p> <p><a href="#">Doc link (optional)</a></p>

# EXECUTIVE ALIGNMENT ROLE CLARITY

Expand Perspectives  
- of key roles across the entire business

<p><b>Problem &amp; Existing Barriers to Solve Them</b></p> <p>Responsible_____</p> <p>Consulted_____</p> <p>Informed_____</p>	<p><b>Solution to Problem &amp; to Overcome Barriers</b></p> <p>Responsible_____</p> <p>Consulted_____</p> <p>Informed_____</p>	<p><b>Unique Business &amp; Technical Values</b></p> <p>Responsible_____</p> <p>Consulted_____</p> <p>Informed_____</p>	<p><b>Sustainable &amp; Unfair Advantage</b></p> <p>Responsible_____</p> <p>Consulted_____</p> <p>Informed_____</p>	<p><b>Target Segments for Early Adoption</b></p> <p>Responsible_____</p> <p>Consulted_____</p> <p>Informed_____</p>
<p><b>Existing Alternatives &amp; Competition</b></p> <p>Responsible_____</p> <p>Consulted_____</p> <p>Informed_____</p>	<p><b>Key Metrics for Proof of Concept/Traction</b></p> <p>Responsible_____</p> <p>Consulted_____</p> <p>Informed_____</p>	<p><b>How You Make Money (biz model)</b></p> <p>Responsible_____</p> <p>Consulted_____</p> <p>Informed_____</p>	<p><b>How You 'Go to Market'</b></p> <p>Responsible_____</p> <p>Consulted_____</p> <p>Informed_____</p>	<p><b>Segments w Repeatable Product-Market Fit</b></p> <p>Responsible_____</p> <p>Consulted_____</p> <p>Informed_____</p>
<p><b>Cost Structure (CAC, Fixed, Variable)</b></p> <p>Responsible_____</p> <p>Consulted_____</p> <p>Informed_____</p>	<p><b>Target Revenue Mix (X/Y Prods, Services, PoCs %s)</b></p> <p>Responsible_____</p> <p>Consulted_____</p> <p>Informed_____</p>	<p><b>How You Efficiently Scale the Business</b></p> <p>Responsible_____</p> <p>Consulted_____</p> <p>Informed_____</p>	<p><b>How You Leverage Ecosystem Players</b></p> <p>Responsible_____</p> <p>Consulted_____</p> <p>Informed_____</p>	<p><b>Existing Obstacles to Sales &amp; Traction</b></p> <p>Responsible_____</p> <p>Consulted_____</p> <p>Informed_____</p>

# OKRs for Functional Clarity

Expand Perspectives  
- of expectations for each function

#	Functional Objectives (quarterly or year goals)	Key Results (specific deliverables & impact)	Context and Color (including dependencies)
1			
2			
3			
4			

For each function, clarify the

Objectives: 'why' (e.g. establish scalable and sustainable growth, efficiency)

Key Results: 'what' (e.g., specific deliverables, operational efficiencies, \$ growth in period)

Comments: add color, context, and key interdependencies with others

# TOP SOLUTION INVESTMENT SOURCES

Expand Perspectives  
- of value contributors to execs & users

*X % Higher Value or Lower Risk*



**Source Here**

*A% Easier of Creation or ...*



**Source Here**

*Y % Lower Effort or Costs*



**Source Here**

*B% Faster Integration*



**Source Here**

*For Business Owners*

*For the End User Experience*

**'Only You' Offer....**



- Iskflsdfjdsflfjsdlfjksd
- lkfdjlsdfjsdlfjsdlfjlsdf
- lsdkfjlsdfjlsdfjldsjsfjsdf

# PRODUCT-MARKET FIT BY SEGMENT

Expand Perspectives  
- where you actually meet customer needs

## Fit by Segment

### Segment 1 Satisfiable Needs

- **Iskfjsdfjdsfjsdfjksd**
  - Ikfdjlsdfjsdfjlsdfjlsdf
  - lsdkfjlsdfjlsdfjlsdfjlsdf
  - ldjkfjsdfjlsdfjlsdfjlsdfjlsdf
- Proven? \_\_\_\_\_  
Repeatable? \_\_\_\_\_  
Priority #? \_\_\_\_\_

### Segment 2 Satisfiable Needs

- **Iskfjsdfjdsfjsdfjksd**
  - Ikfdjlsdfjsdfjlsdfjlsdf
  - lsdkfjlsdfjlsdfjlsdfjlsdf
  - ldjkfjsdfjlsdfjlsdfjlsdfjlsdf
- Proven? \_\_\_\_\_  
Repeatable? \_\_\_\_\_  
Priority #? \_\_\_\_\_

### Segment 3 Satisfiable Needs

- **Iskfjsdfjdsfjsdfjksd**
  - Ikfdjlsdfjsdfjlsdfjlsdf
  - lsdkfjlsdfjlsdfjlsdfjlsdf
  - ldjkfjsdfjlsdfjlsdfjlsdfjlsdf
- Proven? \_\_\_\_\_  
Repeatable? \_\_\_\_\_  
Priority #? \_\_\_\_\_

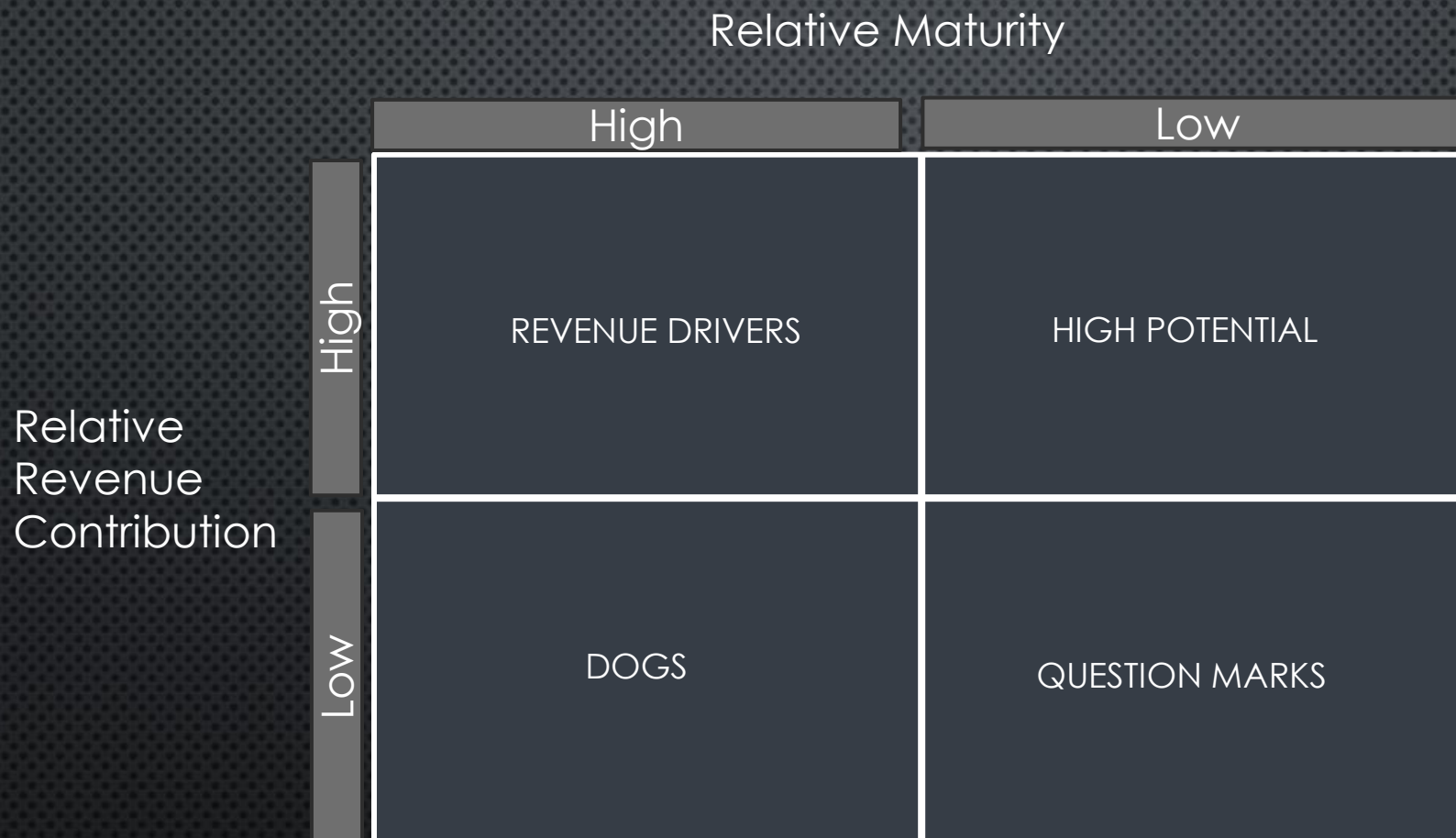
### Segment 4 Satisfiable Needs

- **Iskfjsdfjdsfjsdfjksd**
  - Ikfdjlsdfjsdfjlsdfjlsdf
  - lsdkfjlsdfjlsdfjlsdfjlsdf
  - ldjkfjsdfjlsdfjlsdfjlsdfjlsdf
- Proven? \_\_\_\_\_  
Repeatable? \_\_\_\_\_  
Priority #? \_\_\_\_\_

helpful for startups

# INVESTMENT PORTFOLIO (MODIFIED BCG MATRIX)

Expand Perspectives (for startups)  
- Investment allocations & return/risk profiles

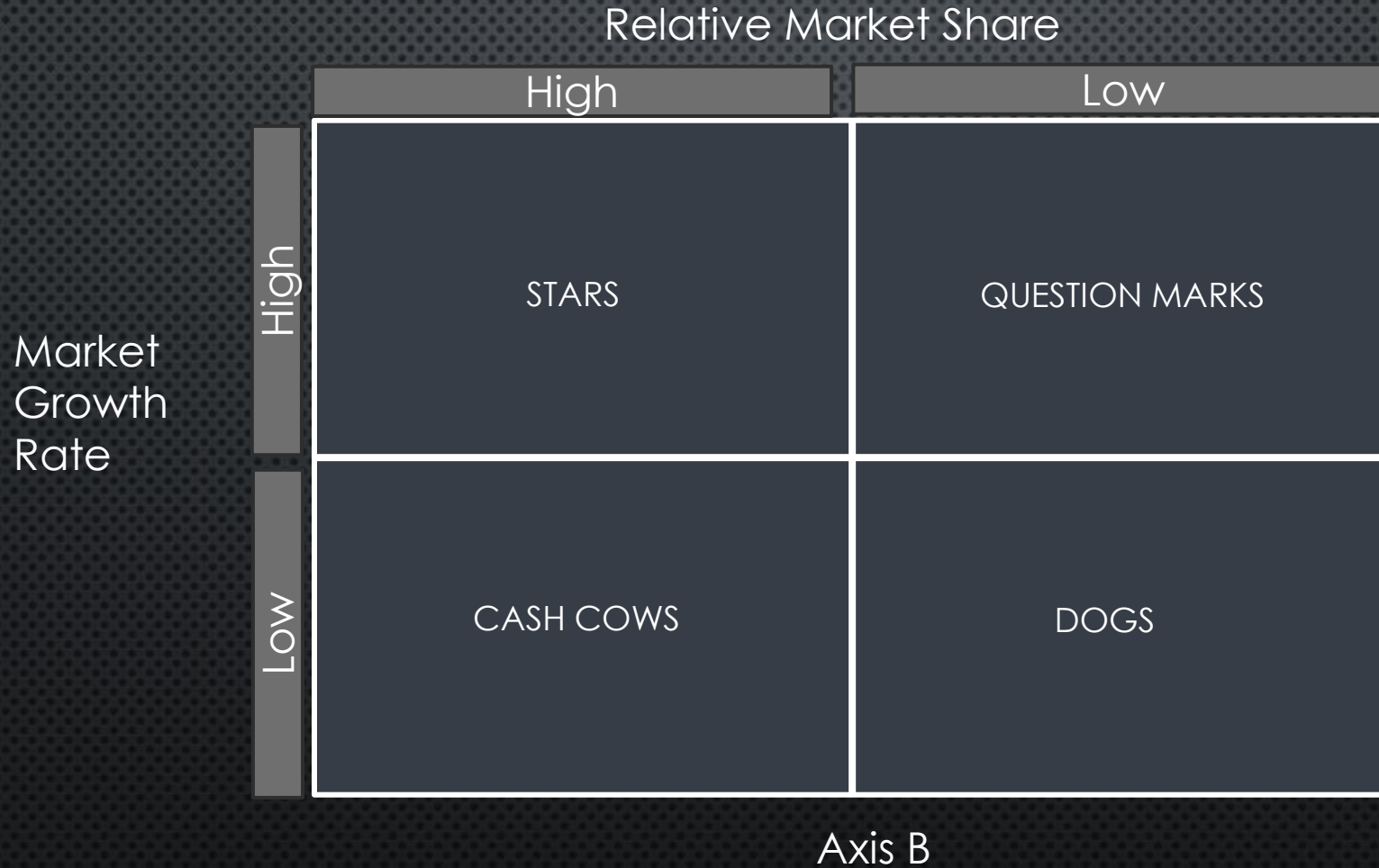


Note:  
“Investments”s can span products, infrastructure, target verticals, geographies, etc.

helpful for multi-product companies

# PORTFOLIO ANALYSIS (TRADITIONAL BCG MATRIX)

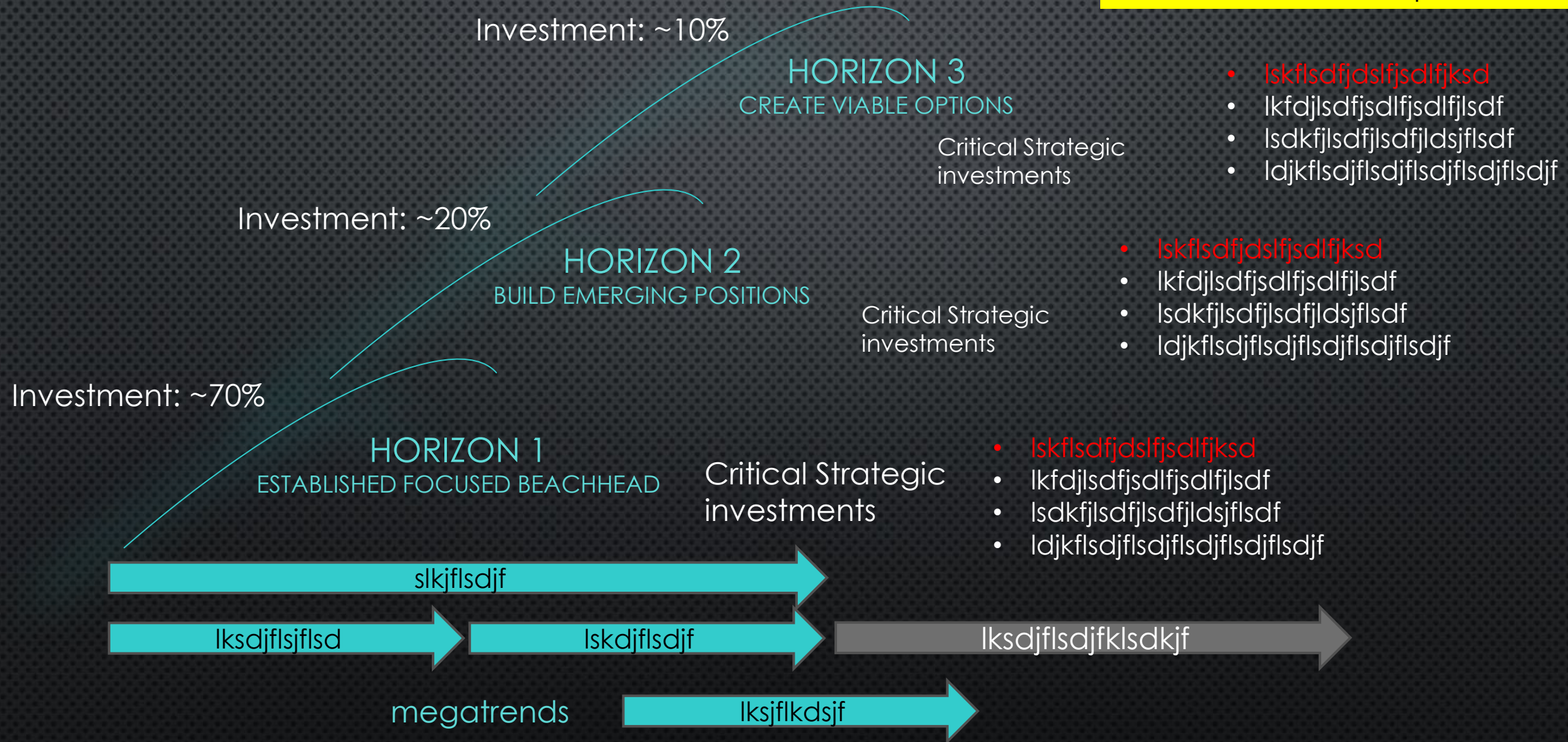
Expand Perspectives (multi-prod companies)  
- Investment allocations & return/risk profiles





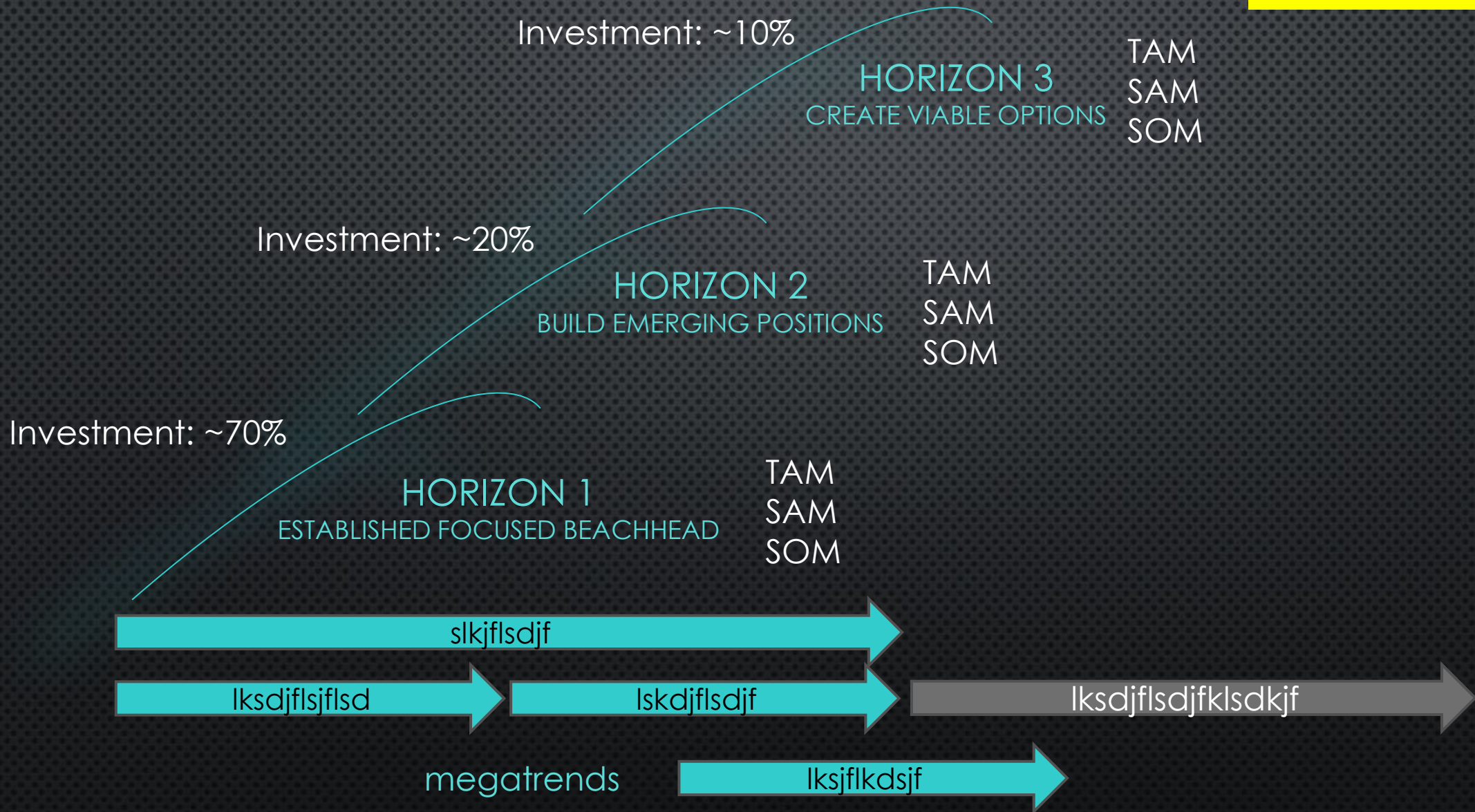
# MULTI-HORIZON INVESTMENT PORTFOLIO

Expand Perspectives  
- investments across roadmap over time



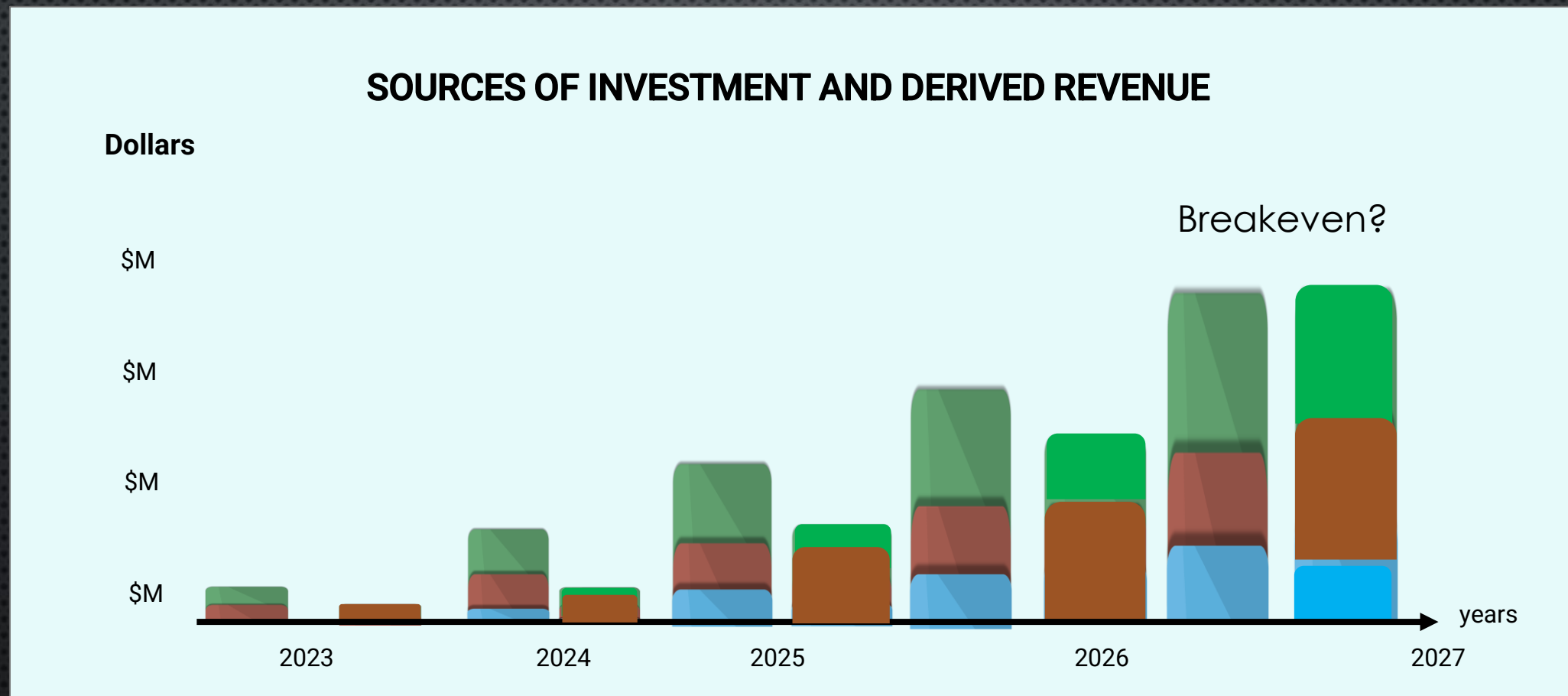
# MARKET IMPACT OF INVESTMENT OPTIONS

Expand Perspectives  
- Investment correlates to market opps



# FINANCIAL VIEW OF KEY INVESTMENTS

Expand Perspectives  
- how investments convert to revenue



investment A

Investment B

Investment C

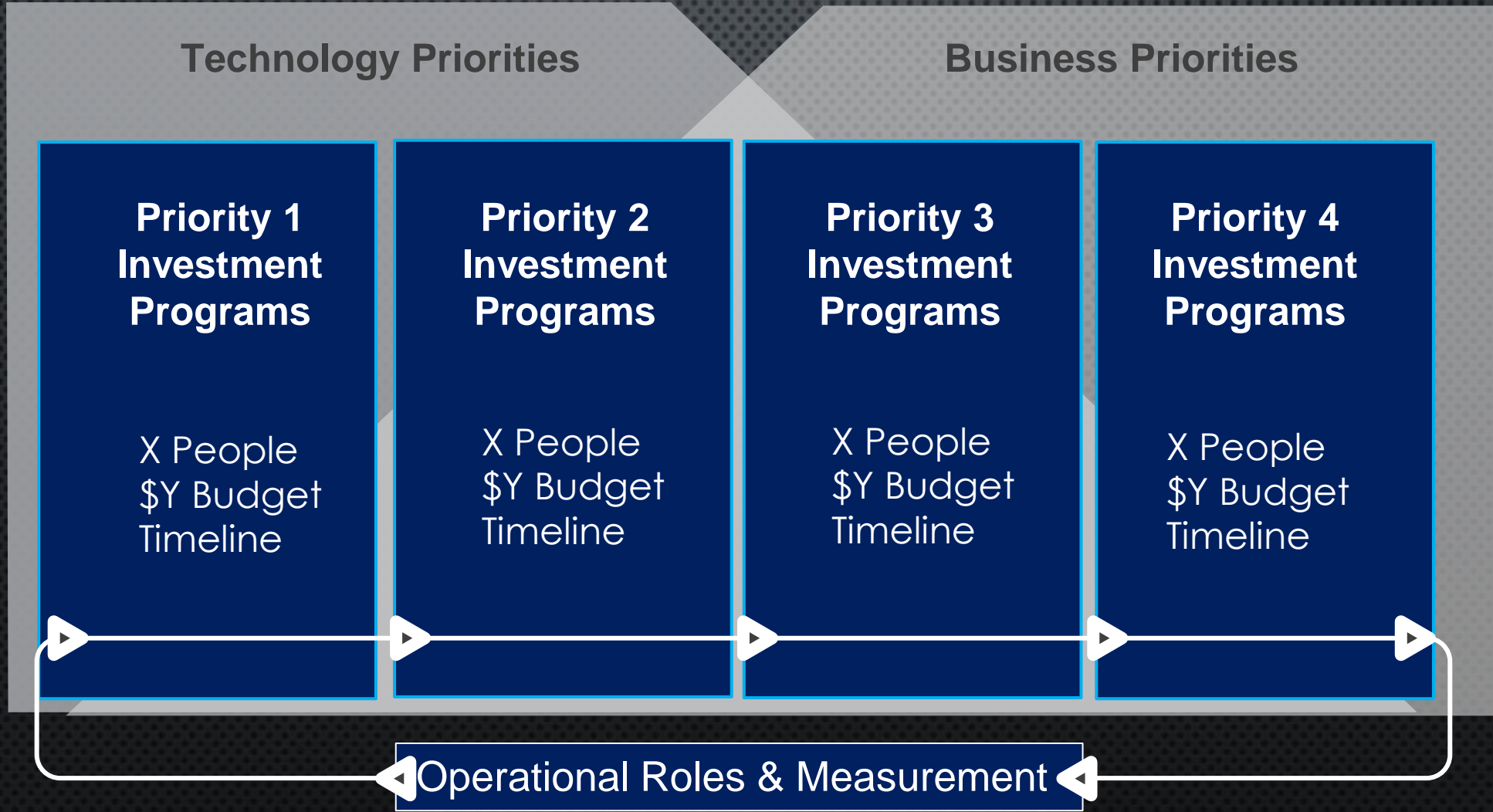
Revenue from A

Revenue from B

Revenue from C

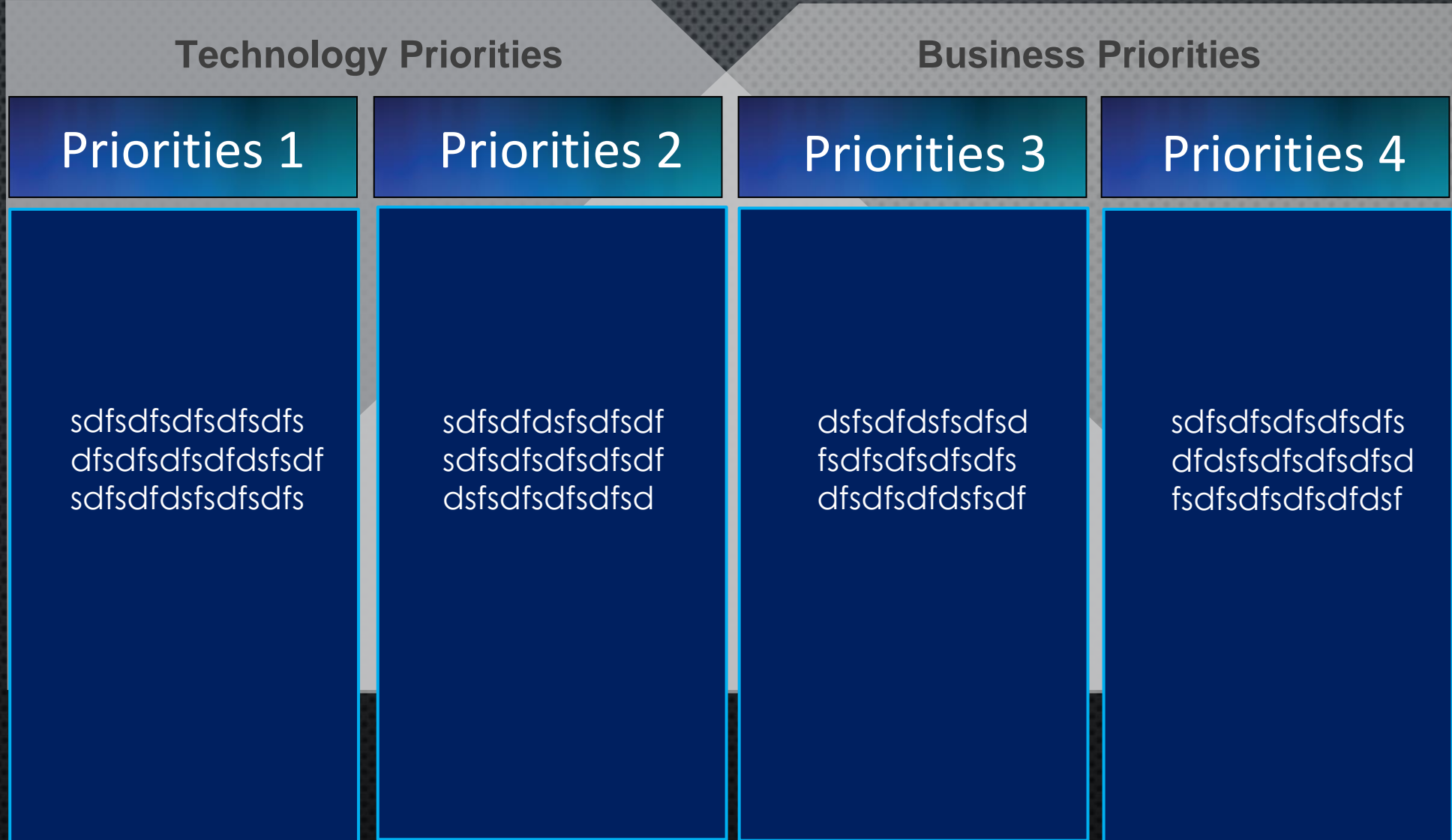
# CEO LEVEL CORPORATE PRIORITIES

Expand Perspectives  
- top priority product and business enablers



# PRIORITIES DESCRIPTION FRAMEWORK

Expand Perspectives  
- top priority program definitions



# PRIORITY GOALS

Expand Perspectives  
- top goals for each priority program

		Technology Priorities		Business Priorities	
		Priorities 1	Priorities 2	Priorities 3	Priorities 4
Programs Well Defined		sdfsdfsdfsdfsdfs dfsdfsdfsdfsdfsdfs sdfsdfsdfsdfsdfs	sdfsdfsdfsdfsdfs sdfsdfsdfsdfsdfs dfsdfsdfsdfsdfs	dfsdfsdfsdfsdfs fsdfsdfsdfsdfs dfsdfsdfsdfsdfs	sdfsdfsdfsdfsdfs dfsdfsdfsdfsdfs fsdfsdfsdfsdfs
	1.	sdfsdfd	fsdfsddsfs	sdfsdfsd	sdfsdfsdfsdfs
	2.	fsdfsdfsdfs	sdfsdfsdfsdfs	sdfsdfsds	sdfsdfsdfsdfs
	3.	sdfsdfsdfs	sdfsdfsdfsdfs	dfsdfsdfsdfsdfs	dfsdfsdfsdfs
	4.	dfsdfsdfsdfs	dfsdfsdfsdfs	dfsdfsdfsdfs	dfsdfsdfsdfs

# PRIORITY ATTRIBUTES

Expand Perspectives  
- operational attributes of top priorities

	Technology Priorities		Business Priorities	
	Priorities 1	Priorities 2	Priorities 3	Priorities 4
	sdfsdfsdfsdfs dfsdfsdfsdfsdfs sdfsdfsdfsdfs	sdfsdfsdfsdfs sdfsdfsdfsdfs dfsdfsdfsdfs	dfsdfsdfsdfs dfsdfsdfsdfs dfsdfsdfsdfs	sdfsdfsdfsdfs dfsdfsdfsdfs dfsdfsdfsdfs
What	dfsdfs	dfsdfs	sdfsdfs	dfsdfs
Who	dfsdfs	dfsdfs	dfsdfs	sdfsdfs
How	dfsdfs	dfsdfs	sdfsdfs	dfsdfs
When	dfsdfs	dfsdfs	sdfsdfs	sdfsdfs

# ZERO BASE BUDGETING

Expand Perspectives  
- relative priorities & budget tradeoffs

	<i>Strategic Value</i>	<i>Revenue 1 yr</i>	<i>Revenue 3 yrs</i>
Investment A	1-10	\$A	\$B
Investment B	1-10	\$A	\$B
Investment C	1-10	\$A	\$B
Investment D	1-10	\$A	\$B
<b>Available Budget</b>			
Investment E	1-10	\$A	\$B
Investment F	1-10	\$A	\$B
Investment G	1-10	\$A	\$B
Investment H	1-10	\$A	\$B



# SALES ENABLEMENT ELEMENTS

Expand Perspectives  
- sales efficiency and scalability

## Your Sales Strategy Here

- Iskfjsdfjdsfjdsfjksd
- lkfdjlsdfjsdlfjsdlfjlsdf
- Isdkfjlsdfjlsdfjldsiflsdf

### Overcome

- ▶ Limited Product-market Fit
- ▶ Cost Justification and Approval
- ▶ Product/Integration Gaps
- ▶ Competition and Alternatives
- ▶ Perceived Risks

### Leverage

- ▶ Business Advantages
- ▶ End User Advantages
- ▶ Portfolio Advantages
- ▶ Infrastructure Advantages
- ▶ Scalability Advantages

### Enable

- ▶ Playbooks & Workflows
- ▶ End User Sales Tools
- ▶ Biz Owner Sales Tools
- ▶ Consultative Sales Skills
- ▶ Lead Generation/Capture

### Streamline

- ▶ Knowledge/Learnings Transfer
- ▶ Access to Sales Tools
- ▶ Engagement Data
- ▶ Forecasting and Renewals
- ▶ Account Information

# SALES ENABLEMENT ELEMENTS

Expand Perspectives  
- hierarchy of messages sales needs

## What's Your Message Hierarchy?



### Overcome

- ▶ Limited Product-market Fit
- ▶ Cost Justification and Approval
- ▶ Product/Integration Gaps
- ▶ Competition and Alternatives
- ▶ Perceived Risks... other barriers

### Leverage

- ▶ Business Advantages
- ▶ End User Advantages
- ▶ Portfolio Advantages
- ▶ Infrastructure Advantages
- ▶ Scalability Advantages

### Enable

- ▶ Playbooks & Workflows
- ▶ End User Sales Tools
- ▶ Biz Owner Sales Tools
- ▶ Consultative Sales Skills
- ▶ Lead Generation/Capture

### Streamline

- ▶ Knowledge/Learnings Transfer
- ▶ Access to Sales Tools
- ▶ Engagement Data
- ▶ Forecasting and Renewals
- ▶ Account Information

# OVERCOMING SALES OBSTACLES

Expand Perspectives  
- how to overcome sales obstacles

## Product-Market Fit

- ▶ How 1?
- ▶ How 2?
- ▶ How 3?

## Product Cost & ROI

- ▶ How 1?
- ▶ How 2?
- ▶ How 3?

## Perceived Risks

- ▶ How 1?
- ▶ How 2?
- ▶ How 3?

## Product Gaps

- ▶ How 1?
- ▶ How 2?
- ▶ How 3?

## Competition

- ▶ How 1?
- ▶ How 2?
- ▶ How 3?

## Sales Scalability

- ▶ How 1?
- ▶ How 2?
- ▶ How 3?

# TARGETING THE RIGHT CUSTOMERS

Expand Perspectives  
- key buckets of ideal target customers

## 'TOP 10'

### Ideal Profile

- *lskflsdfjdsfjdsfjksd*
- lkfdjlsdfjdsfjdsfjlsdf
- lsdkfjlsdfjlsdfjlsdfjlsdf
- ldjklfsdjfjsdfjlsdfjlsdfjlsdf

### TOP 10 CATEGORY A

LOGOS

LOGOS

### TOP 10 CATEGORY B

LOGOS

LOGOS

## 'FOCUS' (e.g, next 20)

### Ideal Profile

- *lskflsdfjdsfjdsfjksd*
- lkfdjlsdfjdsfjdsfjlsdf
- lsdkfjlsdfjlsdfjlsdfjlsdf
- ldjklfsdjfjsdfjlsdfjlsdfjlsdf

### FOCUS CATEGORY X

LOGOS

LOGOS

### FOCUS CATEGORY Y

LOGOS

LOGOS

'OTHER' (what to do about them, eg, On line only? Nothing?)

# IMPROVE SALES RELATED ROI

Expand Perspectives  
- How to qualify & interact w prospects

## Layer 2 Qualification Criteria

### Clearly Identified Problem

- Iskfjsdfjdsfjdsfjksd
- lkfdjlsdfjsdfjlsdf
- lskfjlsdfjlsdfjlsdf
- ldjkfjsdfjlsdfjlsdf

### Champion with Budget Authority

- Iskfjsdfjdsfjdsfjksd
- lkfdjlsdfjsdfjlsdf
- lskfjlsdfjlsdfjlsdf
- ldjkfjsdfjlsdfjlsdf

### Agreement on What's Required for a 'Yes'

- Iskfjsdfjdsfjdsfjksd
- lkfdjlsdfjsdfjlsdf
- lskfjlsdfjlsdfjlsdf
- ldjkfjsdfjlsdfjlsdf

## 'Gates' to Corporate Resources

### Gate to Product Mgr

- Iskfjsdfjdsfjdsfjksd
- lkfdjlsdfjsdfjlsdf
- lskfjlsdfjlsdfjlsdf
- ldjkfjsdfjlsdfjlsdf

### Gate to Field Apps

- Iskfjsdfjdsfjdsfjksd
- lkfdjlsdfjsdfjlsdf
- lskfjlsdfjlsdfjlsdf
- ldjkfjsdfjlsdfjlsdf

### Gate to R&D

- Iskfjsdfjdsfjdsfjksd
- lkfdjlsdfjsdfjlsdf
- lskfjlsdfjlsdfjlsdf
- ldjkfjsdfjlsdfjlsdf

# ENABLING THE DIRECT CHANNELS

Expand Perspectives  
- tools to increase channel efficiency

## Channel

Channel #1 to Penetrate XYZ

Channel #2 to Penetrate ABC

...

## Channel Enablers

Playbooks

Segment Profiles, Qualification Criteria, Using Advantages to Win, Getting to a 'Yes', Objection Handling, Competitive Tactics...

Workflows

Adoption On-ramps, User Engagement, User Journeys and Flows, Integrations to Realize Advantages...

Sales Tools

Business and End User Views in Web, Presentations, References, Influencers, Case Studies, Other Credibility Enhancers...

# CONSULTATIVE SELLING w/ MODULAR CONTENT

Go to next page

Expand Perspectives  
- tools for consultative/multi-level selling

Budget Worthy  
Challenges/Pain  
Discovery Tools

*Grounded in 3 most common  
budget-worthy challenges*

Existing vs. Desired  
State Options and  
Opportunities

*Showing Clear Sources of Gaps  
and Intuitive Views of 'Why You'*

Workflow Level  
Solutions to Budget  
Worthy Challenges

*Showing Solutions that are Above  
The Task Level but Clarify the 'How'*

Sub-Solutions,  
Demos & Enabling  
Technologies

*Showing Deeper Dive on How You  
Deliver Solutions Down to the Task Level*

Adoption &  
Objection Handling  
Tools

*Grounded in 3 most common deal-  
threatening objections and concerns*

Competitive Tools,  
Methods and  
Comparisons

*Focused on 3<sup>rd</sup> Party Competitors  
and 'Good Enough'*

Example Pitches  
for:  
Business Execs  
Program Owners  
Functional Teams

*To be Used Only as a Starting Point to Quickly  
Tailor Engagements*

*Often Senior Level Discussions Use Minimal  
Slides, But Draw from this Knowledge*

# ENABLING B2C CHANNELS (VERSUS B2B)

Expand Perspectives  
- complexity and B2B vs. B2C considerations

## B2B Sales & Marketing

### B2B Customers

- Professionals
- Multiple Stakeholders
- Small Focused Segments

### B2B Marketing

- Business Impact
- Lead Generation
- Education/Webinars
- Account References
- Awareness/Events
- Whitepapers
- Thought Leadership
- Business Influencers

### B2B Sales

- Consultative
- Solutions Focus
- Relationship Based
- Long Lead Times

## B2C Sales & Marketing

### B2C Customers

- Individuals
- Families
- Large Segments

### B2C Marketing

- Emotional
- Brand Focused
- Comparison Sites
- On Line Reviews
- Offers/Promotions
- Social Media
- Word of Mouth
- Consumer Influencers

### B2C Sales

- Reach & Awareness
- Transaction Based
- Immediate Satisfaction
- Short Lead Times

As complexity in the buying process and the value of the purchase increases, the process moves to solutions and sales led.





# ACCOUNT-BASED MARKETING (ABM)

Expand Perspectives  
- aligning sales/mktg in key accounts

	ACCOUNT PROFILE	ACCOUNT PLAN	ACCOUNT MARKETING
ACCOUNT ARCHITECTURE	<p><b>Situation</b></p> <ul style="list-style-type: none"> <li>• Customer Business</li> <li>• Identified Problem</li> <li>• Value to Solve Problem</li> <li>• Identified Budget</li> <li>• Willingness to Change</li> <li>• Competition</li> <li>• Obstacles to Sales</li> </ul>	<p><b>Goals</b></p> <ul style="list-style-type: none"> <li>• Beachhead</li> <li>• Land and Expand</li> <li>• PoC</li> <li>• Target Revenue</li> <li>• Reference Account</li> <li>• Success Story</li> <li>• PR</li> </ul>	<p><b>Marketing Roles/ Expectations</b></p> <ul style="list-style-type: none"> <li>• Amplifying Awareness</li> <li>• Customizing Sales Tools</li> <li>• Quantifying Value</li> <li>• Customer Education</li> <li>• Enhancing Credibility</li> <li>• Co-Architecting Meetings</li> <li>• Enhancing Relationships</li> </ul>
ACCOUNT REQUIREMENTS	<p><b>Buying Decision Makers</b></p> <ul style="list-style-type: none"> <li>• Champions</li> <li>• Exec Sponsor</li> <li>• Evaluation Owners</li> <li>• Veto Power Owners</li> <li>• Influencers</li> <li>• Decision Makers</li> </ul>	<p><b>How to Gain Support</b></p> <ul style="list-style-type: none"> <li>• Request Path to 'Yes'</li> <li>• Focus on Key Care-about</li> <li>• Build Personal Relations</li> <li>• Establish Trust</li> <li>• Make Players Look Good</li> <li>• Overcome Objections</li> </ul>	<p><b>Marketing Promotion Channels</b></p> <ul style="list-style-type: none"> <li>• Webinars</li> <li>• Meetings</li> <li>• Live Demonstrations</li> <li>• Direct email, Links to Blogs and Web</li> <li>• Reference Accounts</li> <li>• Sales Teams</li> </ul>
ACCOUNT BUILDING BLOCKS	<p><b>Buying Process</b></p> <ul style="list-style-type: none"> <li>• Awareness</li> <li>• Interest</li> <li>• Understanding</li> <li>• Engagement</li> <li>• Trial/Evaluation</li> <li>• Approval</li> <li>• Purchase</li> <li>• Positive Experience</li> <li>• Measurable Impact</li> <li>• Renewal</li> </ul>	<p><b>Plan to Get to 'Yes'</b></p> <ul style="list-style-type: none"> <li>• Define Clear Path to 'Yes'</li> <li>• Confirm Budget</li> <li>• Educate Decision Makers</li> <li>• Demonstrate Value</li> <li>• Define Acceptance Criteria</li> <li>• Orchestrate Resources</li> <li>• Set up Trial/Evaluation</li> <li>• Facilitate Adoption</li> <li>• Overcome Each Objection</li> <li>• Close Each Gate to 'Yes'</li> </ul>	<p><b>Marketing Content</b></p> <ul style="list-style-type: none"> <li>• Customized Exec Presentations</li> <li>• Customized User Presentations</li> <li>• Tailored/Customized Demos</li> <li>• White Papers/Blogs</li> <li>• Relevant Case Studies</li> <li>• Key Partners and Integrations</li> <li>• Objection Handling FAQ</li> <li>• Product Documentation</li> <li>• Customized Pricing/Bundles</li> <li>• Solution Roadmaps</li> </ul>

# BUSINESSS PITCH

**Expand perspective on how  
others might view your business**

*View in Notes Page Mode to Get 'Tips'*

COMPANY NAME

Your Elevator Pitch

XYZ, CEO

www.xxx.com

# INTRODUCTION

- X IS A Y COMPANY
- FOCUSED ON THE MANDATE FOR A IN THE Z MARKET
- PROVEN TEAM WITH SUCCESSFUL XYZ
- ASKING FOR \$XM SEED OR SERIES A

# PROBLEM & WHY NOW



## Definition

consectetur adipiscing elit,  
sed diam nonummy nibh  
euismod tincidunt ut laoreet  
dolore magna aliquam erat  
volutpat.

- ... urgency
- .... Implications

## Headlines

...Forbes, Wall  
Street Journal...

## Infographics

X Ifjlsdjsl  
Y Idjfsdkj  
Z lkjldffjdlkjf



## YOUR VISUAL

## WHY NOW?

Explain why  
customers need to  
address this  
problem now

# 'YOUR COMPANY'

## MISSION

Exciting and bold summary of how you want to impact the industry, businesses, consumers

## FOCUS

Be specific here, e.g, Level 3 and 4 autonomous car path planning

## VALUE

Customer value with metrics where possible

## OFFERING

XYZ Types of Products, Services, Software, IP, Apps, etc..

## YOUR VISUAL



# THE SOLUTION

YOUR VISUAL



## WHAT YOU DO

What you offer and  
what you solve

YOUR VISUAL



## HOW YOU DO IT

Your approach to  
solve the problems



Expand Perspectives  
- how it improves what

# CUSTOMER VALUE



YOUR VISUAL

YOUR VISUAL

## BEFORE

## VS.

## AFTER

What Your Customers Do  
Without Your Solution

What Your Customers Do  
With Your Solution

*Value Metrics*

*Value Metrics*

Expand Perspectives  
- how big the \$ opportunity is

# MARKET OPPORTUNITY

TAM/SAM 2023



TAM/SAM Now

CAGR: XYZ/Year

Spend Market Size Visual  
from Credible Source

Market Segments

OR



- Segment 1
- Segment 2
- Segment 3
- Segment 4

Expand Perspectives  
- your sustainable secret sauce

# SUSTAINABLE ADVANTAGES

## YOUR VISUALS



### Data

consectetuer adipiscing elit, sed diam nonummy nibh euismod tincidunt ut laoreet dolore magna aliquam erat volutpat.



### Patents

consectetuer adipiscing elit, sed diam nonummy nibh euismod tincidunt ut laoreet dolore magna aliquam erat volutpat.



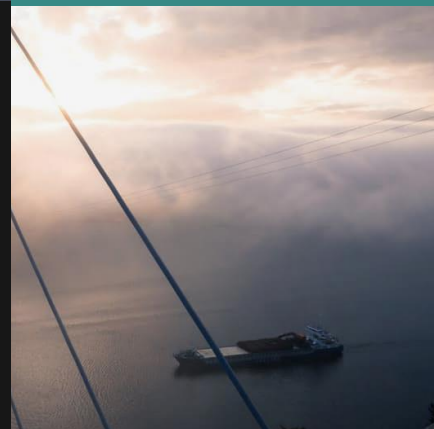
### Technology

consectetuer adipiscing elit, sed diam nonummy nibh euismod tincidunt ut laoreet dolore magna aliquam erat volutpat.



### Expertise

consectetuer adipiscing elit, sed diam nonummy nibh euismod tincidunt ut laoreet dolore magna aliquam erat volutpat.

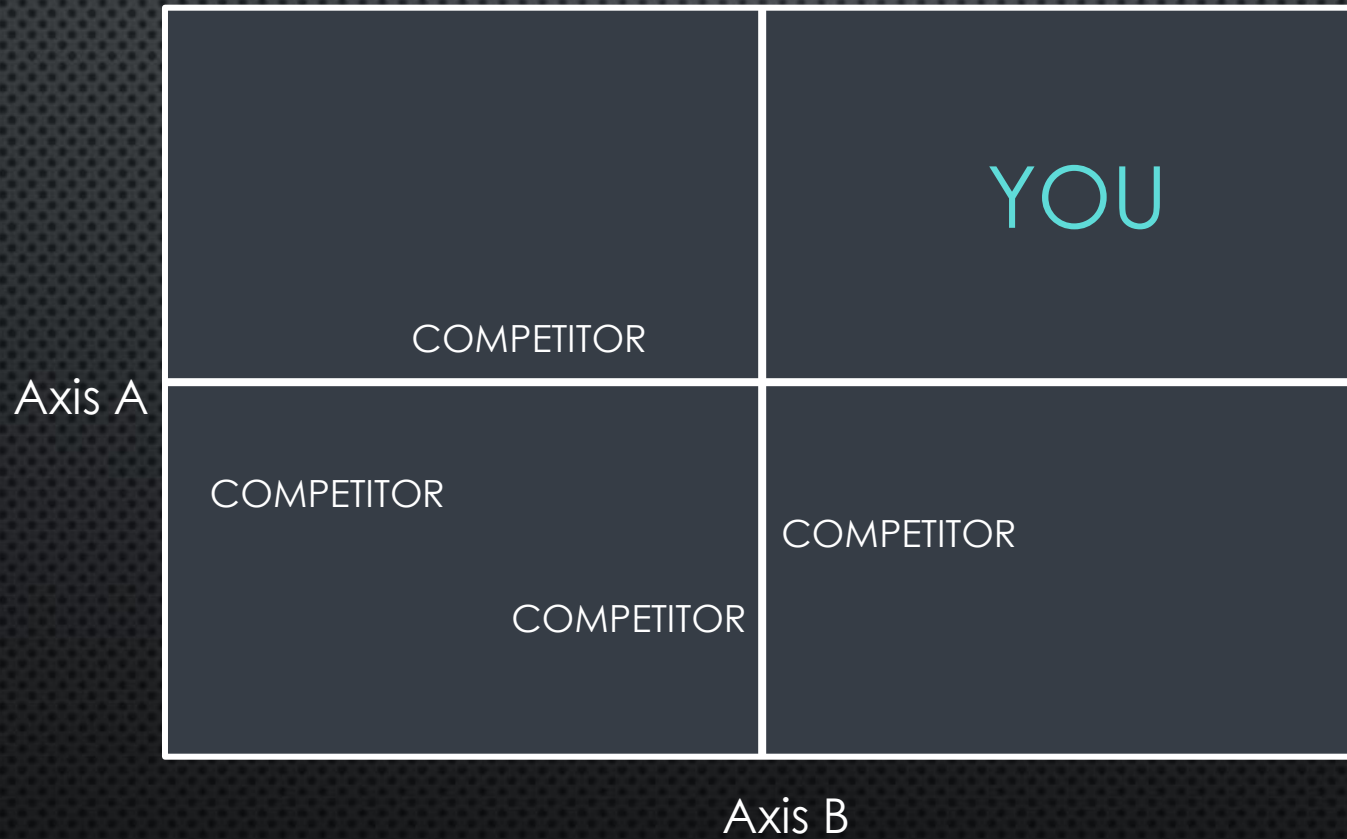


### OTHER

consectetuer adipiscing elit, sed diam nonummy nibh euismod tincidunt ut laoreet dolore magna aliquam erat volutpat.

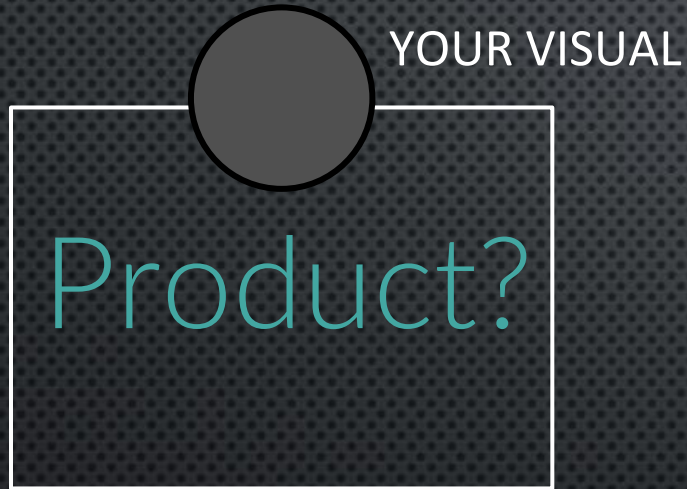
Expand Perspectives  
- How you compare to alternatives

# COMPETITION

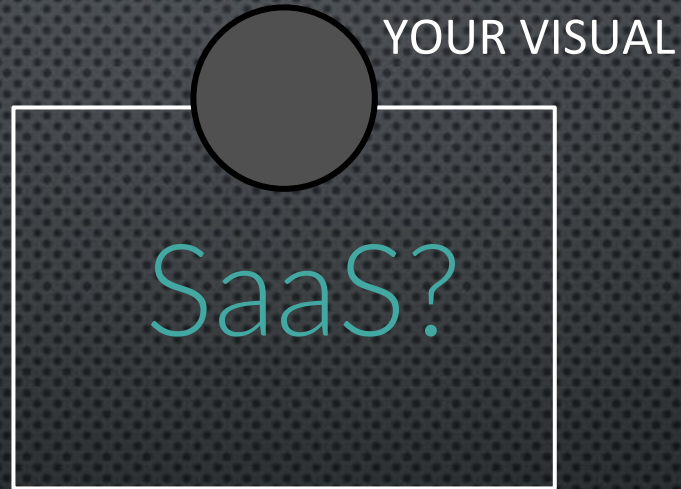


Expand Perspectives  
- How operate the business

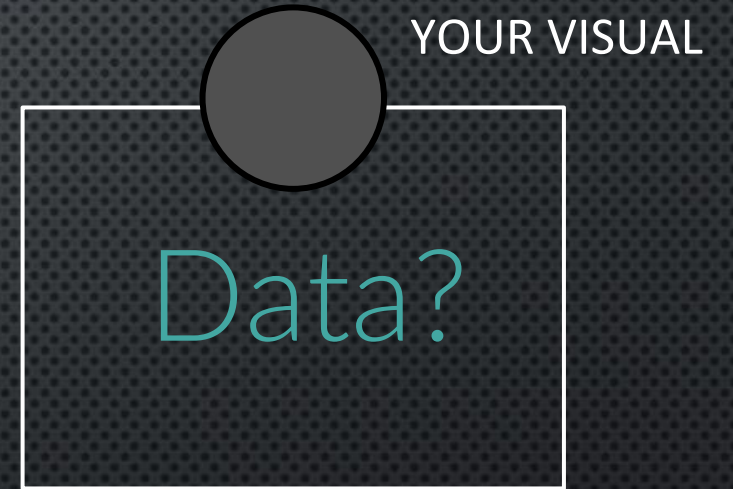
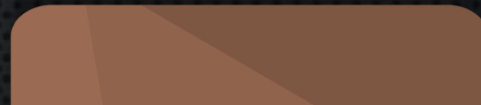
# BUSINESS MODEL AND COMPONENTS



How You Charge



How You Charge

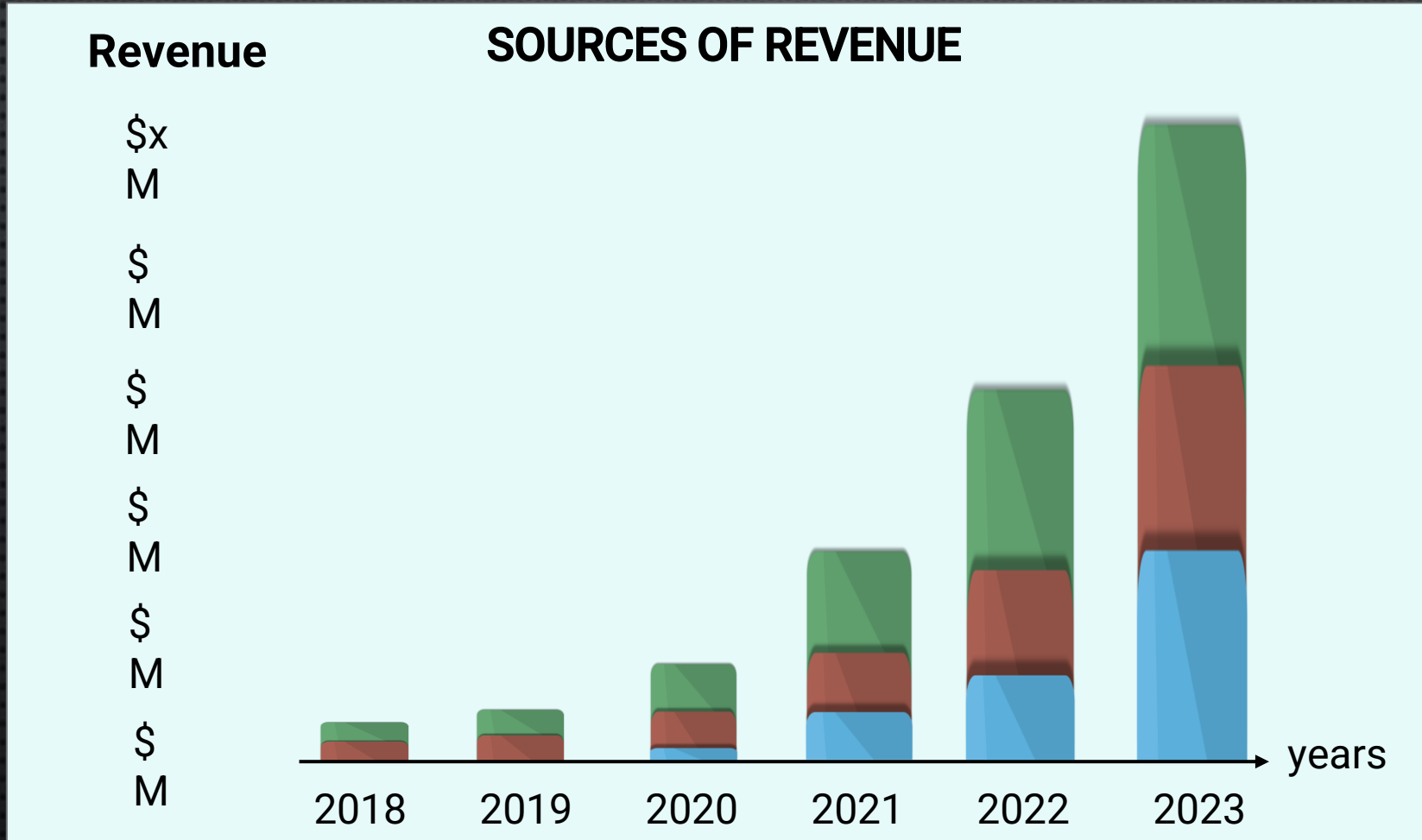


How You Charge



Expand Perspectives  
- Where your revenue will come from

# 5 YEAR FORECAST



- COMPONENT A
- COMPONENT B
- COMPONENT C

Expand Perspectives  
- who you will work with to scale

# CUSTOMER AND PARTNERS

## X Suppliers

### CATEGORY A

LOGOS

\*LOGOS

### CATEGORY B

LOGOS

\*LOGOS

### Y VARS

LOGOS

\*LOGOS

### Z DISTRIBUTORS

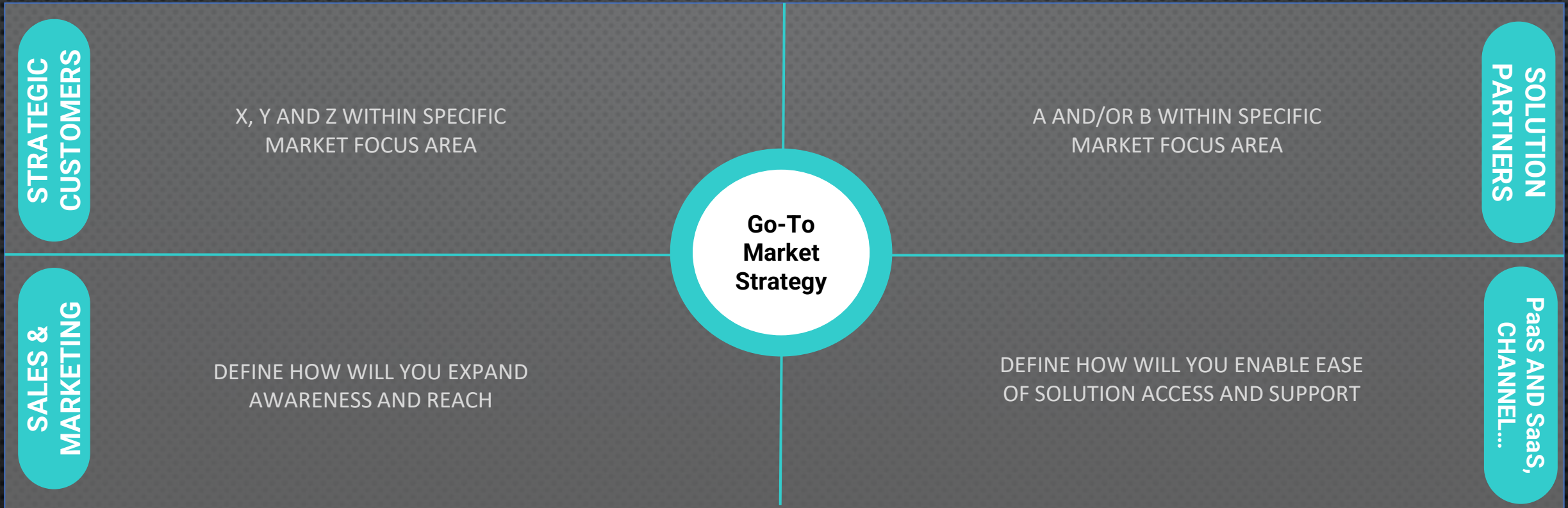
LOGOS

*\*Potential exit opportunities*

Expand Perspectives  
- who you will reach customers

# GO TO MARKET

## FOCUS



## SCALE



# THE TEAM



**JOHN DOE**

amet, consectetur adipiscing elit, sed diam nonummy nibh euismod tincidunt ut laoreet dolore magna aliquam eratamet, consectetur adipiscing elit, sed diam nonummy nibh euismod tincidunt ut laoreet dolore magna aliquam erat



**JOHN DOE**

amet, consectetur adipiscing elit, sed diam nonummy nibh euismod tincidunt ut laoreet dolore magna aliquam eratamet, consectetur adipiscing elit, sed diam nonummy nibh euismod tincidunt ut laoreet dolore magna aliquam erat



**JOHN DOE**

amet, consectetur adipiscing elit, sed diam nonummy nibh euismod tincidunt ut laoreet dolore magna aliquam eratamet, consectetur adipiscing elit, sed diam nonummy nibh euismod tincidunt ut laoreet dolore magna aliquam erat



**JOHN DOE**

amet, consectetur adipiscing elit, sed diam nonummy nibh euismod tincidunt ut laoreet dolore magna aliquam eratamet, consectetur adipiscing elit, sed diam nonummy nibh euismod tincidunt ut laoreet dolore magna aliquam erat



Expand Perspectives  
- your progress to date

# ACCOMPLISHMENTS TO DATE

- DATE ● A significant goal your company has achieved.
- DATE ● A significant goal your company has achieved.
- DATE ● A significant goal your company has achieved.
- DATE ● A significant goal your company has not achieved.

## CUSTOMER VALIDATION

Customer  
Logo

Customer  
Logo

Customer  
Logo

Customer  
Logo

Expand Perspectives  
- your sources of financing

# FINANCIALS



RAISED TO DATE



Investor  
Logo

Investor  
Logo

Investor  
Logo

Investor  
Logo

## Current Investors

Expand Perspectives  
- \$ needs and how you'll use it

# ASK AND USE OF FUNDS



## USE OF FUNDS

- R&D.....
- Business Development ....
- Marketing...
- Sales....



## GOALS OF FUNDS

- Milestone A within X Months
- Milestone B within X Months
- Milestone C within X Months

# SUMMARY

**Problem** (EXCITING INDUSTRY LEVEL) X MANDATE, CUSTOMER CHALLENGE & 'WHY NOW'?

**Solution** XYZ COMPANY (SIMPLE CATEGORY AND LABEL) DELIVERING ABC (OFFERINGS)

**Advantages** (PROVEN?) A, (MOST POWERFUL?) B AND (?) C, X PATENTS ?

**Opportunity** ~\$XM REVENUE AND \$A-\$BM SAM IN 2023 WITH XYZ TRACTION (EVIDENCE)

**Biz Model** PRODUCT? LICENSING? SAAS? DATA SERVICE?

**Go2Market** FOCUS ON XYZ AND SCALE WITH ABC

**Team** PROVEN TEAM WITH SUCCESSFUL START-UP? AND EXIT? IN X

**Ask** \$XM FOR A, B AND C

# COMPANY NAME

THANK YOU FOR YOUR TIME



info@startup.com



www.startup.com



000-0000 0000



@twitter



@facebook

Expand Perspectives  
- how to introduce yourself

# INTRODUCTION TEASER

- ONCE PITCH TESTED AND STABLE, DEVELOP INTRODUCTION TEASER SHEET USING TEMPLATE ON THE RIGHT
- THIS MAY RESULT IN FURTHER REFINED MESSAGING THAT SHOULD BE UPDATED BACK INTO THE PITCH BEFORE FINALIZED

<i>YOUR LOGO</i>	<b>Introduction</b>	
<b>WHAT YOU DO SUMMARY</b>		
<i>What you are tackling...</i>		
<i>industry quotes</i>	<i>Industry Focus Visual</i>	<i>Company Specific Visual</i>
Text based introduction of the company... 2 paragraphs...		
<b>Company Snapshot</b>		
<b>Mission</b> (exciting Industry level) X mandate, customer challenge		
<b>Focus</b> Be specific here, e.g, Level 3 and 4 autonomous car path planning		
<b>Value</b> Clear value to customers, metrics where possible		
<b>Solution</b> XYZ Company (simple category and label) Delivering ABC (offerings)		
<b>Advantages:</b> (Proven?) A, (Most Powerful?) B and (?) C, X <u>Patents?</u>		
<b>Opportunity:</b> ~\$XM Revenue and \$A-\$BM SAM in 2023 with xyz Traction (evidence)		
<b>Ask:</b> \$xM for a, b and c		
<i>Contact: XYZ, (xxx) xxx-xxx, xxxx@xxxx.com</i>		
<b>Management Team</b>		
<b>XYZ – Founder and CXO</b> History... Track record...		
<b>XYZ – CxO</b> History... Track record...		
<b>XYZ – CxO</b> History... Track record...		
<b>Advisory Board</b>		
XYZ: History...		
XYZ: History...		
XYZ: History...		
XYZ: History...		
XYZ: History...		