

Current State	Transition Strategy	Future State
<p><b>SUMMARY:</b> SaaS licensing and Professional Services frequently contribute to revenue via an increase in users or usage. As [redacted] models allow for minimal revenue impact per user, a <b>proactive strategy to increase market share and revenue focuses on increasing the quantity of new users</b> (New Customer Business (NCB): net new logos; and, Cross-Sell (CS): new services/projects to an existing logo).</p>		
<p style="text-align: center;"><b>Reactive Growth</b> ~ 3% Market Share</p> <p><b>AE's incentivized on limited-revenue producing accounts/activities.</b></p> <ul style="list-style-type: none"> <li>No quota system, limited behavior influence</li> <li>Mostly reactive pursuit strategy</li> <li>Variable earning's ramp</li> <li>Limited behavior incentives</li> </ul> <p><b>In-bound, passive lead gen; limited advertising (Pull)</b></p> <ul style="list-style-type: none"> <li>Binary lead qualification</li> <li>Unpredictable, passive lead conversion (~20%)</li> <li>Advert marketing campaigns - ~2:1 ROI</li> <li>No target market: Free-for-all lead conversion</li> <li>Inconsistent "Why IC" message</li> <li>Frequent IT (vs business) focused messaging</li> </ul> <p><b>High-touch renewal system and limited cross-sells:</b></p> <ul style="list-style-type: none"> <li>Limited strategic account visibility <ul style="list-style-type: none"> <li>CS and PS potential not quantified</li> </ul> </li> <li>Higher cost of sale (AE Time)</li> <li>Inconsistent target/impression strategy</li> <li>% of customers unaware of offerings/capabilities</li> </ul> <p><b>Assumed, flat licensing model</b></p> <ul style="list-style-type: none"> <li>No strategic incentives</li> <li>Zero adoption impact - minimal usage data</li> <li>Limited customer sentiment</li> </ul>	<p style="text-align: center;"><b>DCI: Define, Create, Implement</b> Provider → Advisor</p> <ul style="list-style-type: none"> <li>Define revenue growth goals</li> <li>Define target market parameters</li> <li>Quantify NCB/CS needed for renewal transition</li> <li>Define lead growth goals</li> <li>DCI: quota and ramp goals</li> <li>Analyze Lead data: customer insights and patterns; potential opportunity</li> <li>DCI: Lead dashboard</li> <li>DCI: SDR and AE growth timelines; career paths</li> <li>DCI: Ad refinement targets/stages/content for 5:1 ROI</li> <li>DCI: "Why IC" message</li> <li>Team-Source customer journey/sales path: Lead to CS to Transactional</li> <li>DCI: impression strategy – targeted content and messaging</li> <li>DCI: Increase customer contacts (IT to Business)</li> <li>DCI: step-path to automation</li> <li>Create Salesforce Whitespace</li> <li>Quantify CS account potential <ul style="list-style-type: none"> <li>Quantify goals – move out transactional</li> </ul> </li> <li>DCI: Renewal position and parameters</li> <li>DCI: Training curriculum and delivery</li> <li>DCI: marketing partnerships</li> <li>Understand options for adoption metrics; define timeline, goals and impression strategy</li> <li>Research/Decide licensing options and ROI</li> <li>DCI: Customer communication goals: interviews, roundtables, recognition</li> </ul>	<p style="text-align: center;"><b>Proactive Growth</b> ~10% Market Share</p> <p><b>Comp plan reflective of desired behaviors:</b></p> <ul style="list-style-type: none"> <li>Quantified CS and NCB potential.</li> <li>Quota system with behavior incentives</li> <li>AE's paid on NCB and CS (80-100% of quota)</li> <li>Target-Market focus <ul style="list-style-type: none"> <li>Strategic account/revenue pursuit</li> </ul> </li> <li>Defined, predictable new-hire ramp</li> <li>Ability to compete for top AE Talent</li> </ul> <p><b>Targeted, out-bound lead gen, advertising and messaging (Push)</b></p> <ul style="list-style-type: none"> <li>5:1 marketing ROI: Sales-coordinated on funnel growth and movement.</li> <li>Improve Lead Conversion Rate</li> <li>Target-Market and Contact focus</li> <li>Consistent IC value proposition</li> <li>Consistent, revenue generating impression strategy across lead/customer types <ul style="list-style-type: none"> <li>Vertical and/or metrics content</li> </ul> </li> </ul> <p><b>Semi-Automated Renewal system with predictable CS attainment:</b></p> <ul style="list-style-type: none"> <li>Proactive impression strategy <ul style="list-style-type: none"> <li>Tailored to customer variables/goals</li> </ul> </li> <li>Reduced cost of sale</li> <li>Defined Sales Path, impression strategy <ul style="list-style-type: none"> <li>Strategic CS pursuit</li> </ul> </li> </ul> <p><b>Flexible licensing model</b></p> <ul style="list-style-type: none"> <li>Strategically reduce barriers to entry</li> <li>Reflective of customer sentiment</li> <li>Ability to affect adoption with usage data</li> </ul>