



The Blueprint for Outside-In™ Success

Designing and Deploying
an **Optimal Revenue
Generation Approach**



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The Blueprint for Success

Designing and deploying an optimal revenue generation approach

Buyers are buying very differently today, with new expectations and needs across their buying journey lifecycle. We have never seen such a disconnect between organizations that sell and service and their prospects and customers. There are more people than ever involved in every buying journey, with differing and changing needs.

These buyers now have multiple channels to gain the information and knowledge they require. They no longer tolerate delays or getting information that is not concise, relevant and valuable. Old selling, marketing, and service approaches fail to meet these needs and have given rise to the disconnect we now see between buyers and sellers. Amidst these challenges, however, there is opportunity. Organizations must rethink their customer-facing approaches, and for those that can reconnect sellers to buyers they will differentiate more on how they interface with their prospects and customers than by the product or service they supply.

Reconnecting sellers to buyers calls for transformation. It's not a case of doing what you used to do, but more efficiently. At the same it's not wholesale change. But it does need to be carefully crafted and managed. We have been working with customer-facing teams for the last 25 years, from small sales teams to global organizations with tens of thousands of customer-facing folk.

The Blueprint for Success brings together what we believe is the optimal

managed process for gaining results in the quickest time possible with the least risk and drama. We have worked through the entire process and have had organizations ready to go in less than 90 days. The results are significant and sustainable including increased in sales productivity of 15 to 35%, increased closing ratio of 12 to 27%, 17 to 120% increase in average deal size, and decreased ramp time to productivity by 50%.

15-35%

*Increased Sales
Productivity*

12-27%

*Increased
Closing Ration*

17-120%

*Increased Avg
Deal Size*

50%

*Decreased
Ramp Time*

The Blueprint for Success lays out a step-by-step approach to transform the organization to a totally customer-centric revenue generation approach. In some cases, you may find that some of the steps have already been completed, but we underscore the need to complete each step so as not to compromise the result or fail to mitigate a risk.

Like many larger projects, it may seem overwhelming and there could be a temptation to look for a shorter or simpler route. We would like to think if there were any shortcuts, we would have found them by now and also offer that, when managed and executed in the fashion described, there is nothing here that defies physics. You will also see that we don't recommend trying to boil the ocean but do divide the overall project into prioritized steps. We believe that there is no simpler way than described here, but this transformation is not optional in today's highly competitive customer-driven world.

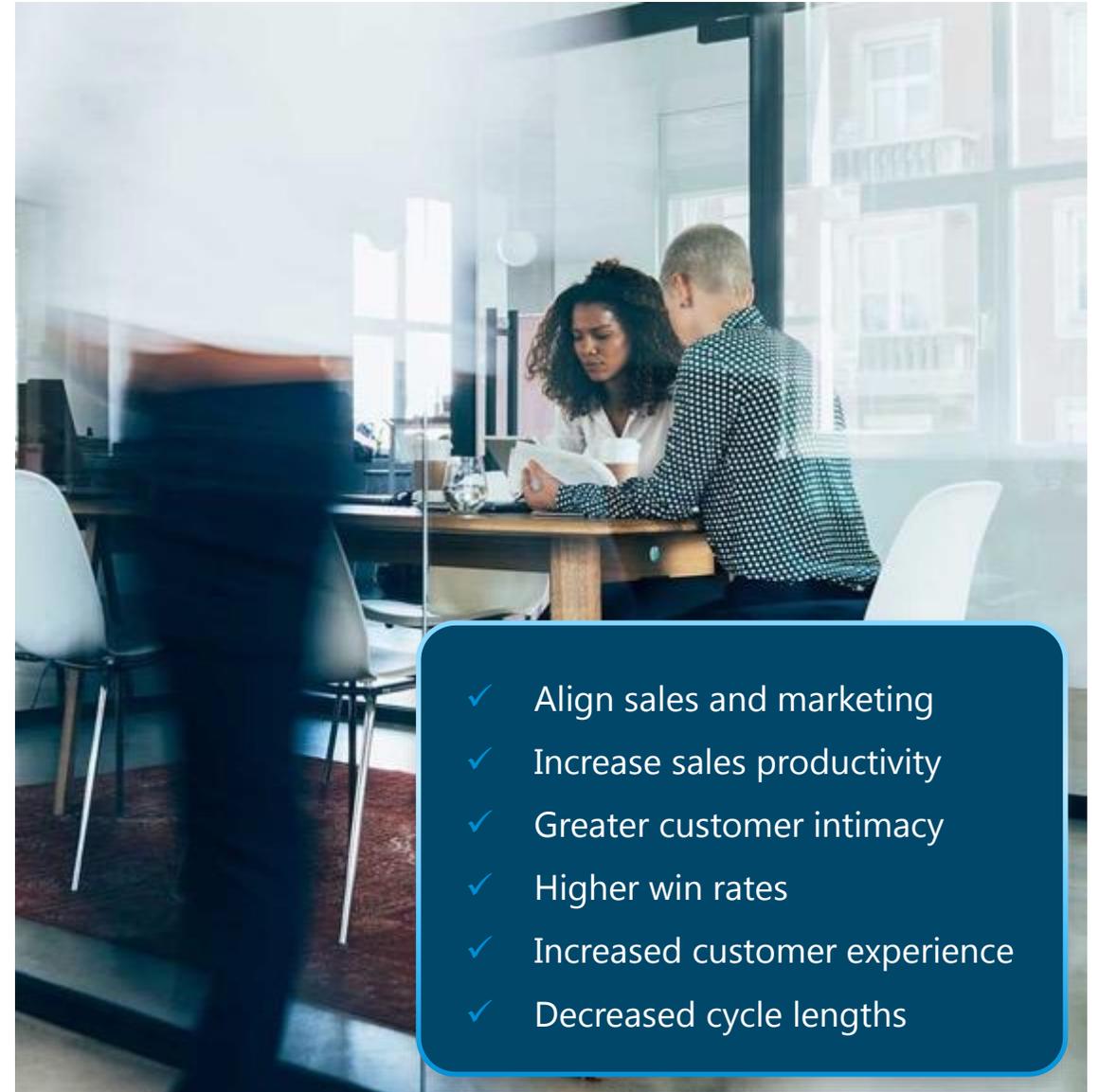
Why

Buyers are buying differently, it's time to start selling differently

The new role of sales and marketing is to manage, and positively influence, the target market's Customer Buying Journey. We know that buyers are now largely disconnected from sellers. The notion of moving a buyer through a sales process may have worked well in the 80's, but it is laughable to think that this may work in today's world. At best, sellers often are simply reacting to their buyers' activities. They are rarely involved in more than 10% of all buying activities, and seldom engage with the buyer until the buyer has completed 50% to 75% of their buying journey.

The only approach that works in today's world is to gain a deep understanding of the buyer. What do they do and who gets involved? And then, as they traverse their buying journey, which is a journey of discovery for the buyer, what do they value, what are their concerns, and how are they making decisions?

To engage with these buyers we need greater precision, born from understanding their world, to add value and be relevant in a personalized manner at each step of their buying journey. We need to engage and manage the conversation in a far more mindful way, aligned to the brand of the organization and founded upon a deliberate Market Engagement Strategy.





Effective Sales and Marketing Must Start with the Outside-in™ Perspective

Engaging in, and staying engaged across the buying journey

In today's world, it's a fallacy to think that you can pull a prospective buyer through your own internal marketing nurturing or sales processes. Buyers go through their own buying journey, essentially a voyage of discovery. Many players are involved, as the buyer moves from identifying a business need or opportunity, through exploring options comparing alternatives approaches, aligning the many stakeholders, planning for success, mitigating concerns, acquiring products or services, and then adopting new approaches.

The Good News

Within a specific market, and for a particular offering, buyers will behave in remarkably similar ways. They will engage in similar activities, similar players will get involved, they will have similar motivations, concerns, anxieties and make their decisions in similar ways.

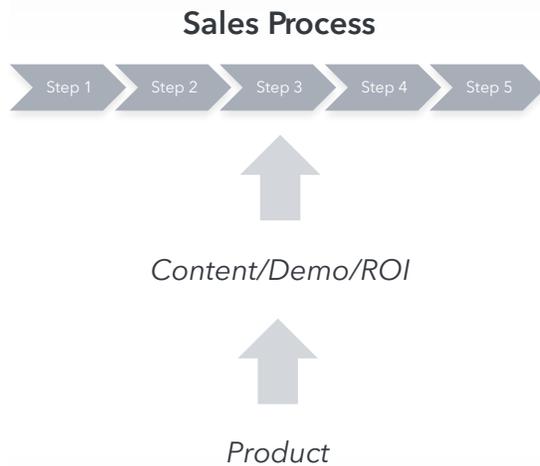
Decoding the Buying Journey

Among the factors that can be mapped for a specific market's Customer Buying Journey are:

- Triggers and dependencies
- Activities and touchpoints
- Players and persona
- Value drivers
- Decision approach
- Concerns and anxieties

The "Good Old Days"

Inside-Out



"It was so easy, just tell them all about your product"

Once upon a time...

Before the internet, marketing often started with the objective of providing information about the product to perspective buyers. Buyers were interested as they had no other way in which to learn about what's new, what's happening, and what's available. In those days, marketing started with the product. Content was developed about the product, and then provided to buyers, often by way of a salesperson who followed a sales process. Times have changed.

Today, effective interactions, that is those that a buyer finds valuable and relevant, isn't so much about the product, it's about addressing the concerns of the buyer. These can range from topics such as how they can gain organizational alignment, how they can manage change, what it will take to successfully adopt a new approach, assessing the alternatives they are faced with, prioritizing decisions, managing multiple and changing dynamics and many other issues. This is when buyers welcome insight and value information that offers it.

Success, in today's world, demands an Outside-In™ approach. It must start with gaining deep insight into the specific market's buying journey, then developing a Market Engagement Strategy. The Market Messaging Matrix then determines the key themes that should resonate with particular buyers, at certain times across their end-to-end buying journey. The Buying Journey Navigator then provides the optimal customer-facing activities, roles and responsibilities.

Precision Marketing

Outside-In™

Customer Buying Journey



Market Engagement Strategy



Market Messaging Matrix



Customer Buying Journey Navigator

Effectively engaging in, and staying engaged, across the buying journey



The New Role for Sales and Marketing is to positively manage the Customer Buying Journey Lifecycle.

Engaging in, and staying engaged across the buying journey

We must enable our customer facing roles to effectively engage in, stay engaged and positively impact the customer buying journey lifecycle.

Precision messaging.

Buyers are bombarded with marketing collateral. Countless companies, are fighting for their attention. However, in today's world it takes far more than well honed value propositions. Success in connecting with today's buyers requires a far more precise approach, matching messaging to the individual concerns of each role at each step of their buying journey.

Managing the conversation.

At the heart of successful sales and marketing is the conversation with the buyer. It must be carefully initiated and then managed with the clear objective of delivering value and relevancy to each individual across the buying journey. We have to meet the buyer where they are, and clearly demonstrate the value we can provide at each step of their journey.

The Blueprint for Success

is the proven path to transform *any* organization to a totally **customer-centric revenue generation and retention approach.**



The Blueprint for Success

Three Phases

We have divided the overall journey for success into three simple phases. For each stage we offer a simple checklist and set of best practices. Where knowledge, assets, or approaches already exist, then a simple tick, and you are done. Where there is further work to be done, we offer the most expedient approaches to ensure that you are scoping, setting up, and ready for successful adoption.

01	Scope & Strategy Establishing the plan for success, ensuring that the key stakeholders are all aligned, and the resources for success are committed.	
02	Development Defining, identifying, and developing the knowledge, processes, approaches, technology and assets for success.	
03	Adoption Enabling the organization for initial, and ongoing, adoption and optimization delivering the expected business results.	

Scope & Strategy Menu

01

Scope &
Strategy

The Why

*Voice of the
Customer*

*Vision of the
Future*

*Prioritized
Initiatives*

Ramp Plan

*Stakeholder
Alignment*

1. The Why

Gaining clarity for, and alignment to, the business drivers, scope, expected results, constraints, risks, contingencies, and dependencies.

2. Voice of the Customer

Starting with the voice of the customer and a clear understanding of what the expected changes will be in buyer awareness, behavior, or decision making provides the all-important Outside-In™ perspective.

3. Vision of the Future

Developing the expected future state and then contrasting it with today's reality, provides the foundation for successful planning. This includes gaining clarity, or creating, the market engagement strategy - specifically how the organization will engage with the market in a meaningful and relevant manner across all stages of the buying journey.

4. Prioritized Initiatives

At this step, consideration is given to the priority of introducing new functionality and approaches to the organization.

5. Ramp Plan

Once the priorities are agreed upon, and the future state is defined, the Ramp Plan provides the details and sequencing of the overall implementation.

6. Stakeholder Alignment

Ensure that all stakeholders are aware and aligned to the program's direction and plan.

Development Menu

02

Development

Market
Messaging

Buying Journey
Navigator

Enablement

Change
Management

Technology
Configuration

Stakeholder
Alignment

1. Market Messaging

What we need to communicate to prospects and buyers changes with the role we are targeting and the stage of the buying journey they are at. We need to know, based upon a deep understanding of their world, how we can bring personalized, valuable, and relevant content to them. At this stage we determine what is valuable to whom, and when, and by what channel it should be delivered.

2. Buying Journey Navigator

The Buying Journey Navigator translates the market engagement strategy into a series of optimal activities and information exchanges. For each step of the buying journey the Navigator clearly details who is responsible for what, what must happen to effectively engage and stay engaged while positively impacting the buying journey.

3. Enablement

At this stage, the requirements to enable the organization for success are considered and, as appropriate, developed. This will include the processes, cadences, training and tools that customer-facing roles will require to implement the strategy.

4. Change Management

Development of the change management and communication plan.

5. Technology Configuration

Configure, load, and integrate the required technologies.

6. Stakeholder Alignment

Ensuring that stakeholders are aware, aligned and committed to the implementation and adoption approach.

Adoption Menu

03

Adoption

Early
Adopters

Benchmark

Launch
Readiness

Rollout

Support

Optimization

1. Early Adopters

Launch the new approaches and technology with a select group of “early adopters” including the provision of the enabling tools and training.

2. Benchmark

Gain the feedback, results, and learnings from the early adopters of the technology.

3. Launch Readiness

Finalize all aspects required for the launch using feedback gained from the early adopters, reviewing and refining the change management plan and approach.

4. Rollout

Manage all aspects of the rollout including the provision of the technology, enabling tools and training, in accordance with the Ramp and Change Management Plan.

5. Support

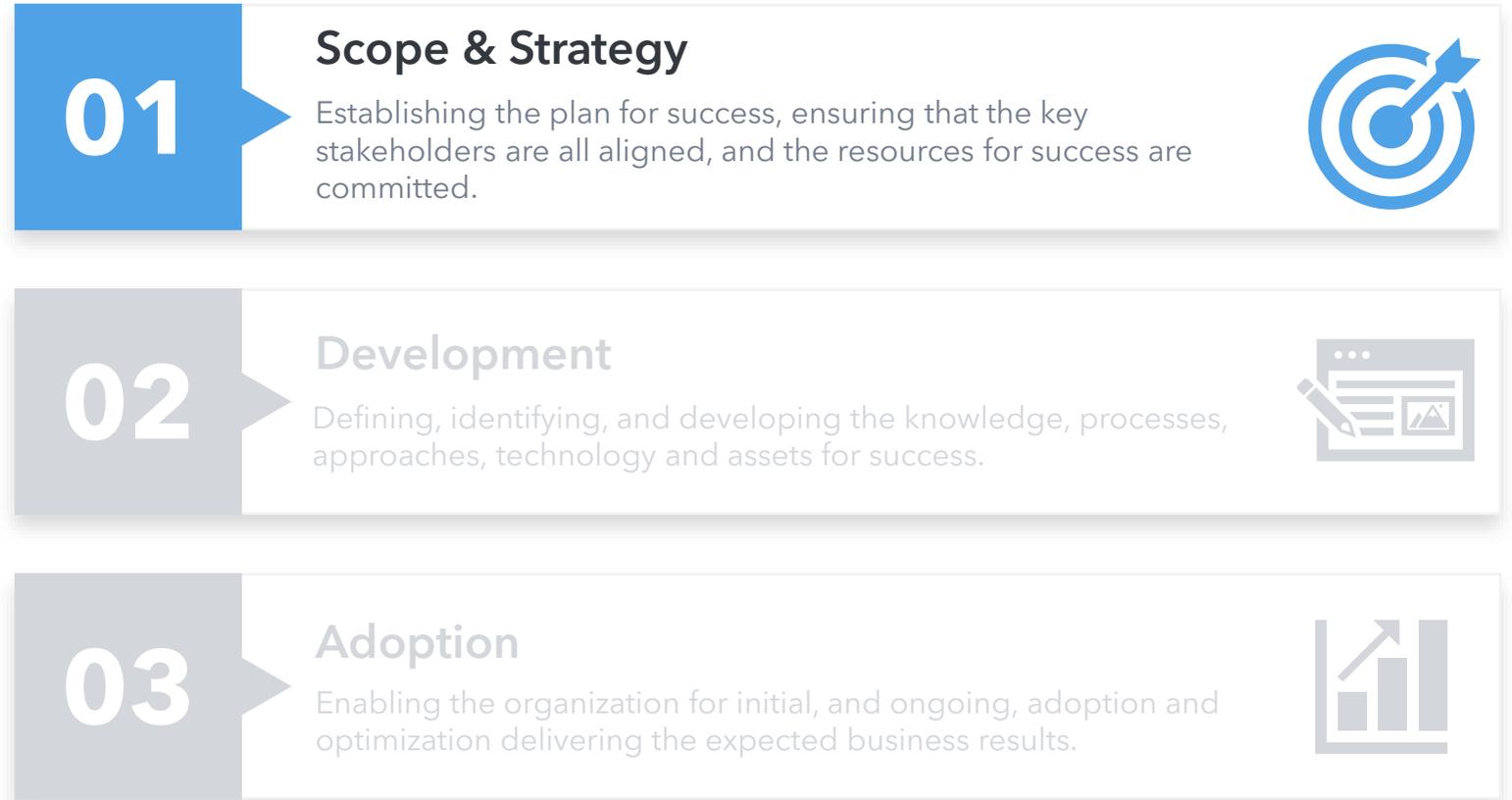
Provision of required support and coaching. Management and review of metrics. Identification of any areas of challenge and emerging best practices.

6. Optimization

Review of adoption, stakeholder feedback and metrics to determine refinement and changes to drive continual optimization.

The Blueprint for Success

Three Phases



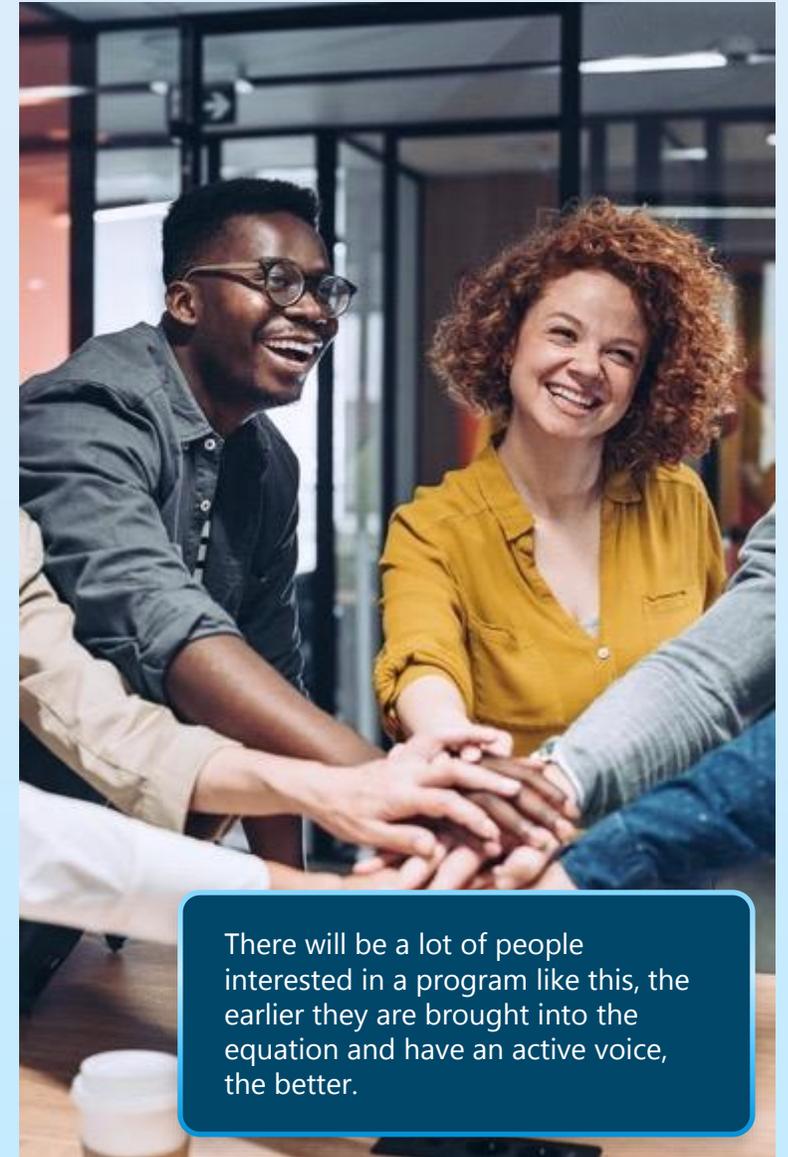
1. The Why

Best planning. Making people successful in a changing world.

As Simon Sinek has now made famous, success in launching new initiatives starts with asking why. The overall program should be guided with a clear understanding of the background, context, and the why behind the investment.

The program should be formally initiated with the identification and inclusion of all stakeholders, including executives, subject matter experts, and representatives from all functions and roles that will be required for success, or will be impacted by, the results. Consider:

- Ownership (Overall ownership of the program)
- Primary (The few that are responsible for success)
- Secondary (Those that own the resources that will be required)
- SMEs (Experts in different areas e.g., IT, Marketing)
- Development (Resources required for the development of the approach e.g., IT marketing)
- Owners (Ongoing roles that will own the creation, maintenance of the approach e.g., marketing, sales enablement)
- End-Users (Ongoing users of the system - sales, marketing)



There will be a lot of people interested in a program like this, the earlier they are brought into the equation and have an active voice, the better.

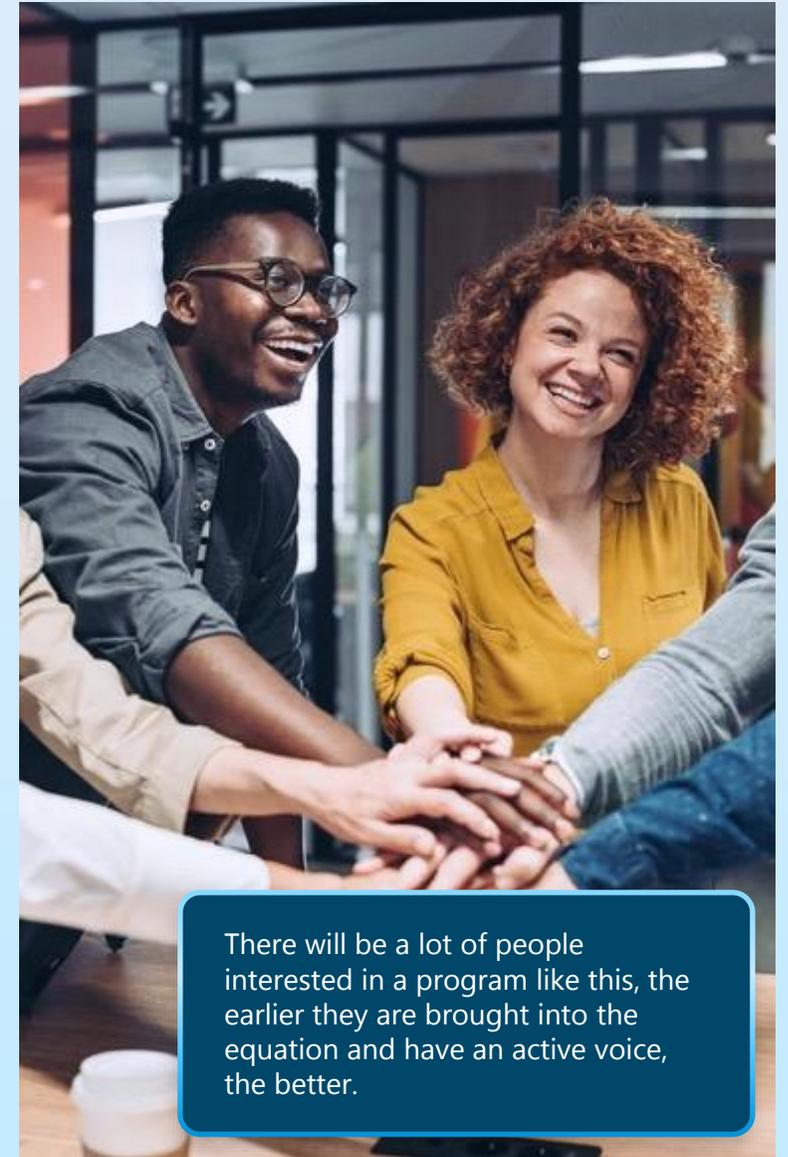
1. The Why (Continued)

Best planning. Making people successful in a changing world.

The program should be formalized with a clear understanding of all the stakeholders' perspectives:

- Why do this at all?
- Business drivers?
- What do they wish to gain?
- What does success look like?
- What are the constraints?
- What is, and what is not, in scope?
- What are the critical success factors?
- Keys areas of integration?
- Overall dependencies?

It is highly recommended that at least one person from each of the various functions involved



There will be a lot of people interested in a program like this, the earlier they are brought into the equation and have an active voice, the better.

2. Voice of the Customer

Starting with the buyer, what, why, and how they buy...or don't buy.

The overall objective for any program must be a more effective way to engage in, and maintain, the relationship with a buyer, or prospective buyer. In today's world this cannot be achieved through generic messaging, content, or presentations. All conversations and interactions must be personalized to bring value and relevancy to the individual buyer. The only way in which to achieve this goal is to start with a detailed understanding of the buyer, and their end-to-end buying journey, and then to be able to use a level of precision to meet them where they are. This dictates that the Customer Buying Journey, for the specific market, needs to be decoded. It should be stressed that the complete buying journey should be mapped, not just the acquisition of an offering, but all the activities from when there is first a realization of a possibility, to the ongoing adoption of new offerings and approaches.

Among the factors that should be mapped are:

- The triggers and dependencies that can cause the buying journey to start.
- The activities in which the buyer is likely to engage, and the touchpoints when a buyer may reach out to a third party, regardless of who that third-party may be.
- The key players and personas that get involved across the buying journey. When they likely get involved and what role they play.
- The decision process of how a buyer knows what to buy and where they are going to buy it.



The Outside-In™ perspective starts with gaining the full picture from the buyers' perspective. All processes can then be built with the outside perspective of the end-to-end Customer Buying Journey.

2. Voice of the Customer (Continued)

Starting with the buyer, what, why, and how they buy...or don't buy.

- The value drivers, or what motivates them to move forward in the buying journey, and how these will change across the journey.
- The buying concerns or anxieties. These are the factors that could cause the buying journey to slow or even to stop.

It is extremely difficult to decode the buying journey without in-depth discovery conversations with customers and prospective buyers. It is all too easy to simply map what you see, or what you imagine, a buyer is doing, and to imply a certain logic into their decision-making approaches. Considering that sales and marketing are usually involved in less than 10% of all the buying activities, it clearly implies that 90% of all buying activities are conducted independently of the sales team. It is vitally important that the Customer Buying Journey map decodes all these activities. The gold for how to truly engage with a buyer and bring distinct value usually lies outside of the traditional selling approaches.

The voice of the customer, that is direct quotes from buyers gained during the mapping process, are a vital component for driving change across the organization. It lifts the conversation about what to do and how to do it from internal debates to a level of objectivity driven by the market.



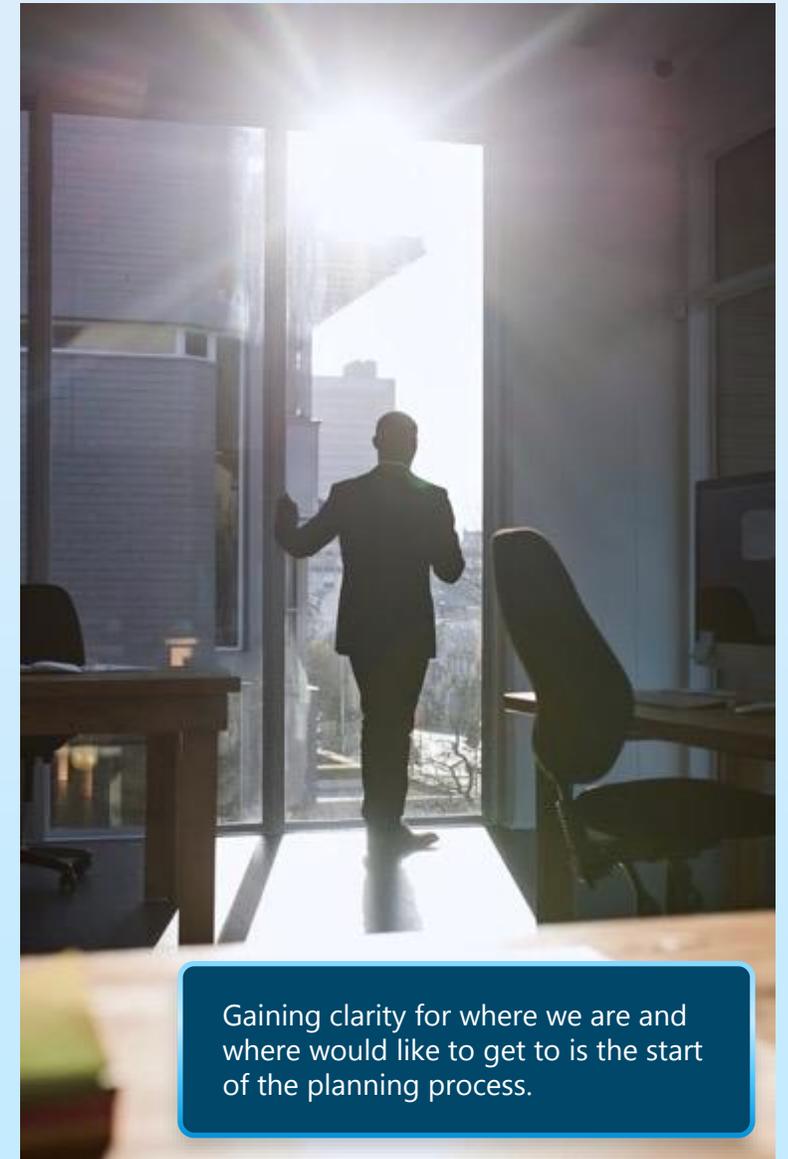
The Outside-In™ perspective starts with gaining the full picture from the buyers' perspective. All processes can then be built with the outside perspective of the end-to-end Customer Buying Journey.

3. Vision of the Future

Starting with the end in mind.

This starts with forging a vision of the future. Representatives from all the stakeholder functions and roles should play a large part of forming a “no constraints” picture of what the future should look like. The vision should be formed within the framework of the market’s end-to-end Customer Buying Journey. The vision should include the elements of:

- What are the defining characteristics of our future customers?
- How do we handle buyers that do not fall into our target market?
- When and how would we engage in the market’s buying journey?
- Would we seek to trigger the buying journey, if so, how?
- How do we position to bring distinctive value to these buyers?
- How do we address each of the roles and personas across the buying journey?
- How do we stay relevant to the buyer across each stage of their buying journey?
- How do we reduce the friction across the buying journey?
- How do we positively impact the buying journey?



Gaining clarity for where we are and where we would like to get to is the start of the planning process.

3. Vision of the Future (Continued)

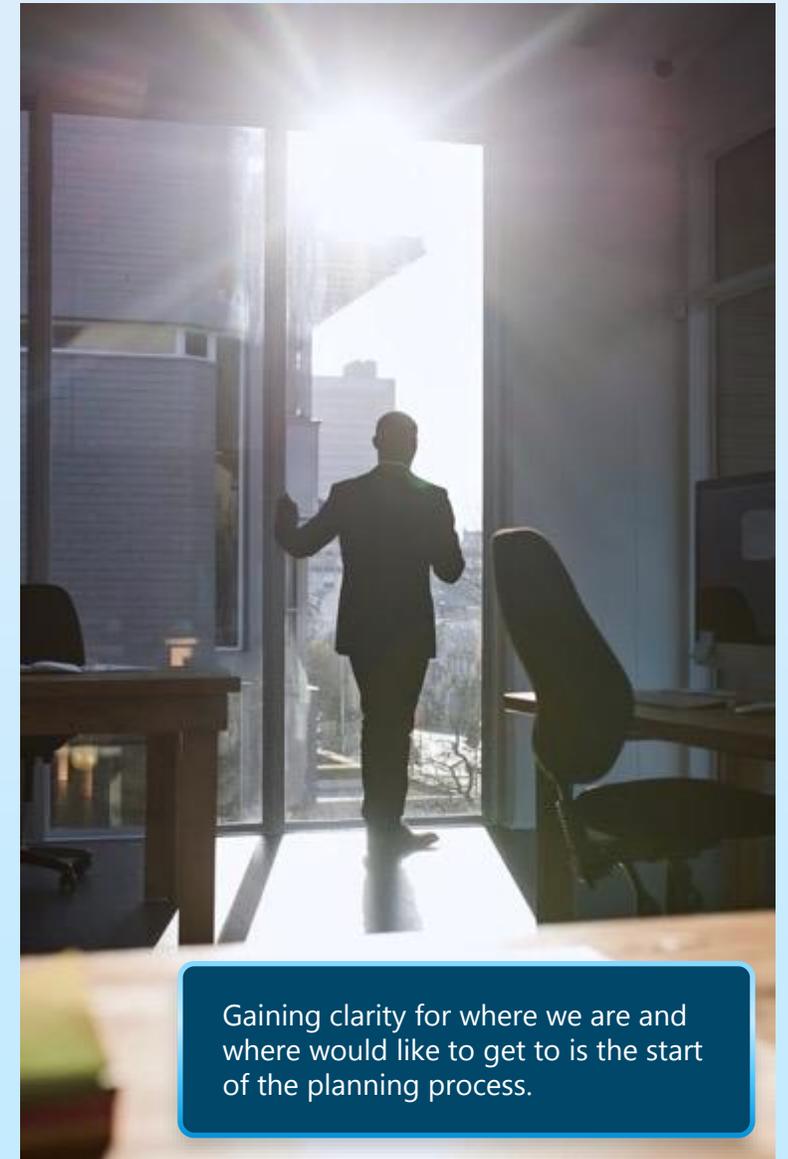
Starting with the end in mind.

With the vision formed, a gap analysis to the current situation should then be conducted, which could involve an assessment of current skills, practices, and competencies. The gap analysis is critical for establishing the success plan for moving towards the vision of the future including the all-important change management approach.

The gap analysis should detail the envisioned changes within the following domains:

- Approaches, processes, or methods
- Sales skills, knowledge, competencies, or behaviors
- Supporting tools or technologies
- The way in which sales and marketing interact with prospects and customers

At this stage it may be determined that there must be a phased approach for moving towards the vision of the future, and that's OK. It's better to make several small and positive steps forward, than to fail attempting to leap too far. This then leads to the next step of prioritizing the initiatives we should undertake.



Gaining clarity for where we are and where we would like to get to is the start of the planning process.

4. Prioritized Initiatives

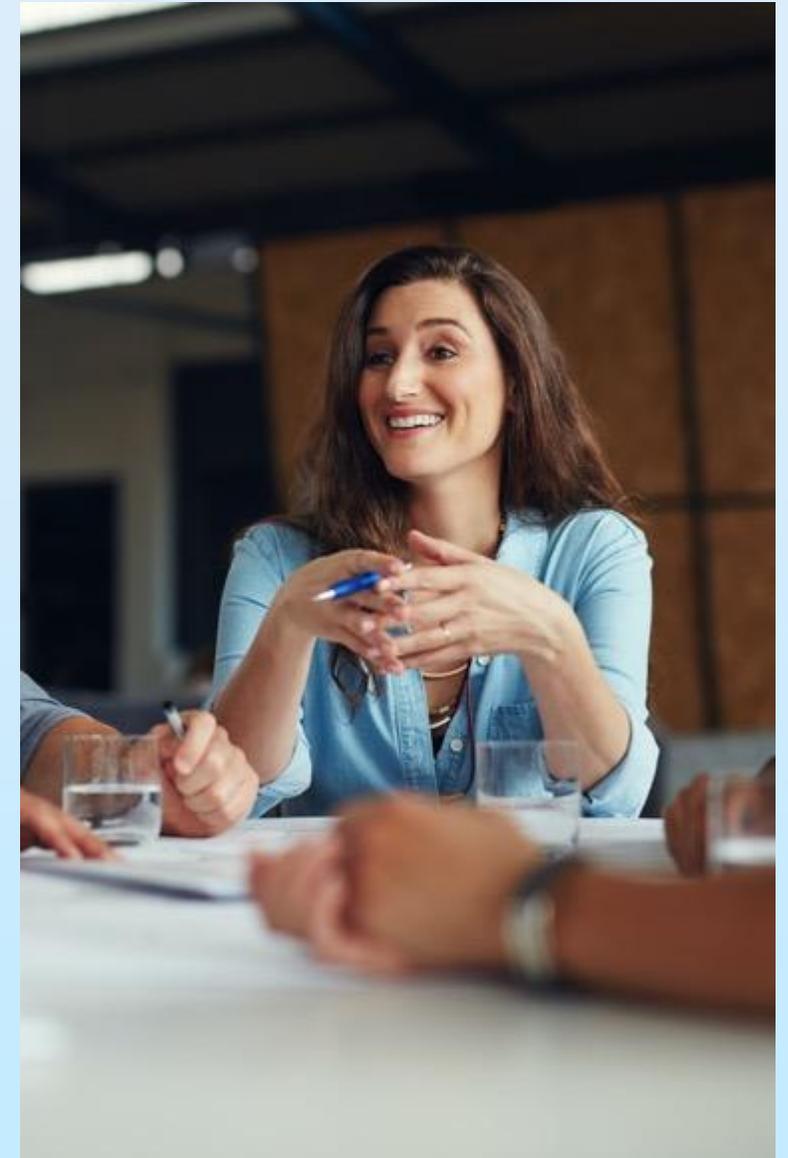
Determining the steps in the journey.

With the vision of the future agreed upon and the gap analysis complete, it's time to prioritize the possible initiatives. Successful adoptions rarely start with trying to do it all, everywhere, and with everyone. To use the old cliché, it is clearly best to first consider the low hanging fruit.

At this stage we use the work completed in the two preceding steps to assess where we are, compared to where we would like to be, all grounded in the external reality of the Customer Buying Journey. For each opportunity we can then assess the overall degree of change, the effort required, and the likely return.

It is important that the various functions and stakeholders are involved in the ranking and decision process. Each possible initiative should be assessed in terms of everything it will take to be well assured of success. We tend to rank all aspects of an overall project in terms of the effort that will be required for success and the size of the prize. This then helps rank and prioritize the various components.

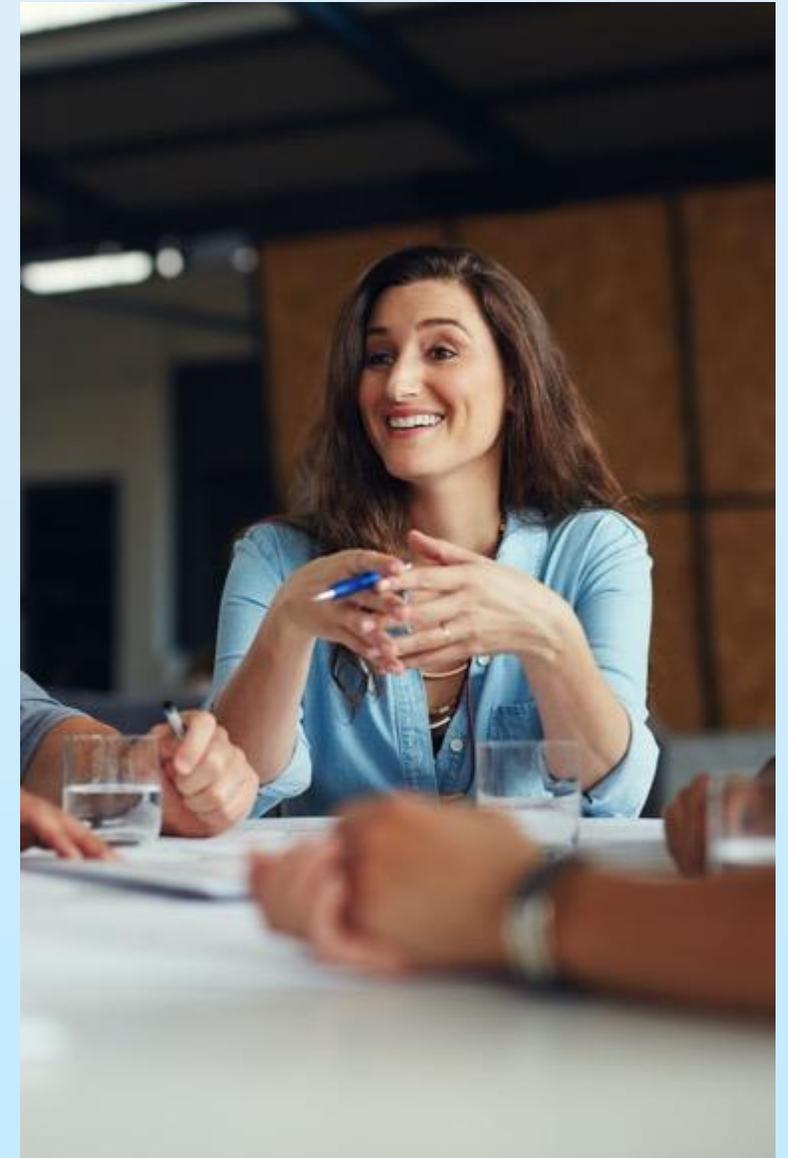
It is often useful to consider the minimal viable product (MVP) for success. That is, what is the minimum in terms of functionality and investment required to gain an acceptable result. Further phases can then add to this foundational layer.



4. Prioritized Initiatives (Continued)

Determining the steps in the journey.

One of the most critical aspects to gaining success, and one of the most trivialized, is that of change management. The adoption of any new approaches or technologies, no matter how trivial, represents change. Salespeople tend to be very busy (not always with the right things, but none-the-less short on time) and they tend to be quick to ignore new tools, technologies, or approaches that don't show an immediate return. It's important to state that this is not because they are technophobic or late adopters. The opposite can be true. Salespeople were among the first to adopt cell phones and electronic organizers – simply because they could easily see the value of those technologies when they first became available. Most importantly, salespeople know how hard it is to get their prospective buyers and customers attention, so they will also be among the first to adopt technology and approaches that they see will help them in that regard. The bottom line, here, is that the change associated with new technologies and approaches must be considered when prioritizing initiatives.



5. Ramp Plan

Detailed planning for success.

With the priorities established it is time to develop the detailed implementational and success plan. The Ramp Plan will provide the details of what is required, by when, and from whom, for the successful rollout and adoption of the technology and associated changes for success.

The three dimensions of People, Processes, and Technology should be considered.

The elements to be considered, agreed upon, and documented include:

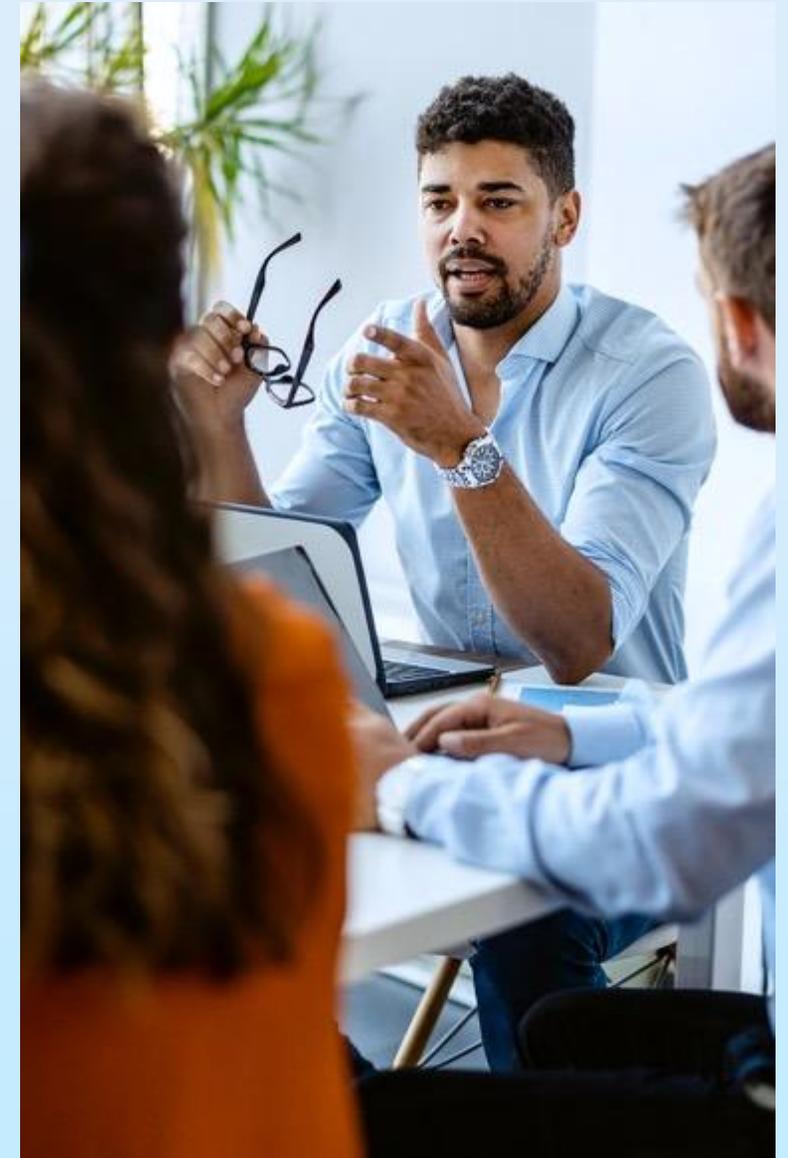
- What's required – Content, Training, Tools, Technology, Processes
 - What/Actions
 - Who
 - When, including cadences
- Dependencies
 - What will each requirement depend upon
- Resources
 - Functional assignments
 - Resources identified and assigned



5. Ramp Plan (Continued)

Detailed planning for success.

- Governance/Curation
 - Exec sponsorship
 - Steering team
 - Core team
- Investments required
- Expected Business Return
 - Planned returns and change
 - Measurement and metrics
- Timeline and key dates
- Constraints
- Critical Success Factors
- Mitigation plans



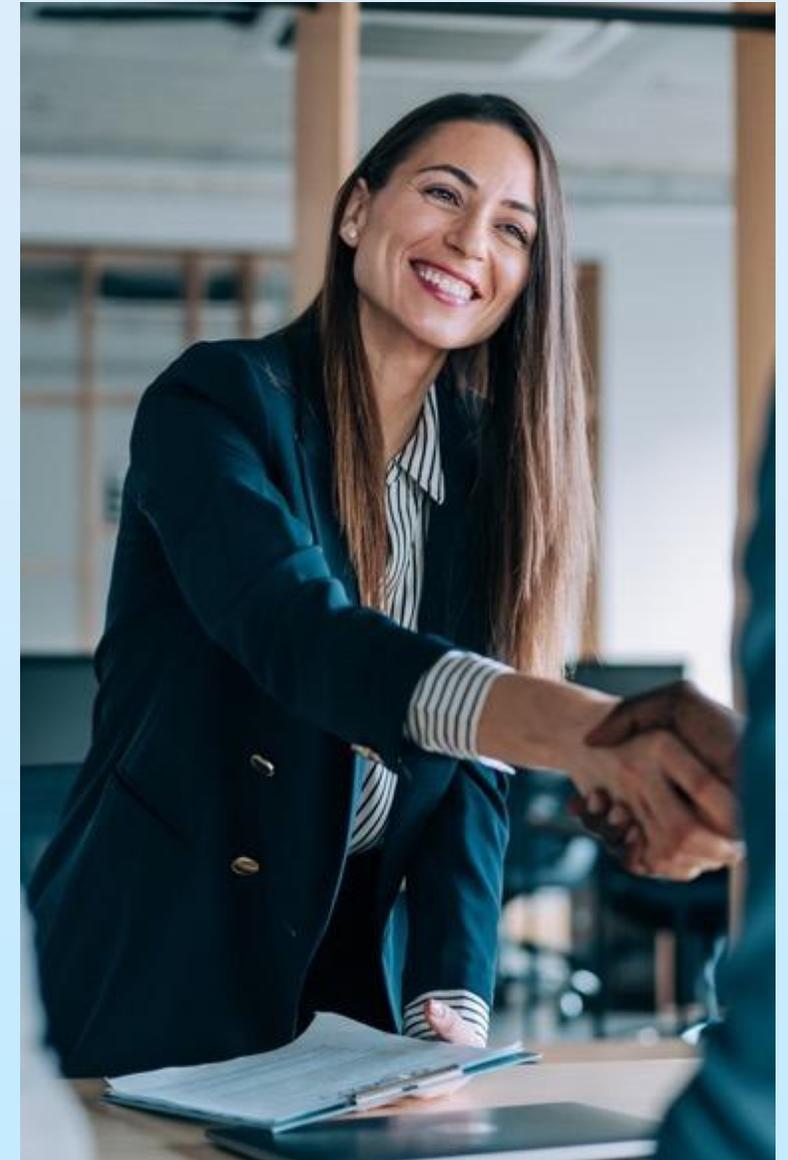
6. Stakeholder Alignment

The GO/NO GO Decision.

At this stage, that is when the planning is done and we are about to start development and setup, it becomes critical that all the stakeholders are aligned and committed to the program. This is not the time for lip-service or “wait and see” behavior. You need firm and active commitment across the various functions and roles.

The project should be presented to the appropriate representatives from each of the stakeholder organizations including the reason for change and an overview of the ramp plan. Roles and responsibilities should be clear and there should also be a clear commitment for all resources from those that “own” them.

There should be clear alignment and agreement for the ongoing governance and support of the program.



The Blueprint for Success

Three Phases

01

Scope & Strategy

Establishing the plan for success, ensuring that the key stakeholders are all aligned, and the resources for success are committed.



02

Development

Defining, identifying, and developing the knowledge, processes, approaches, technology and assets for success.



03

Adoption

Enabling the organization for initial, and ongoing, adoption and optimization delivering the expected business results.

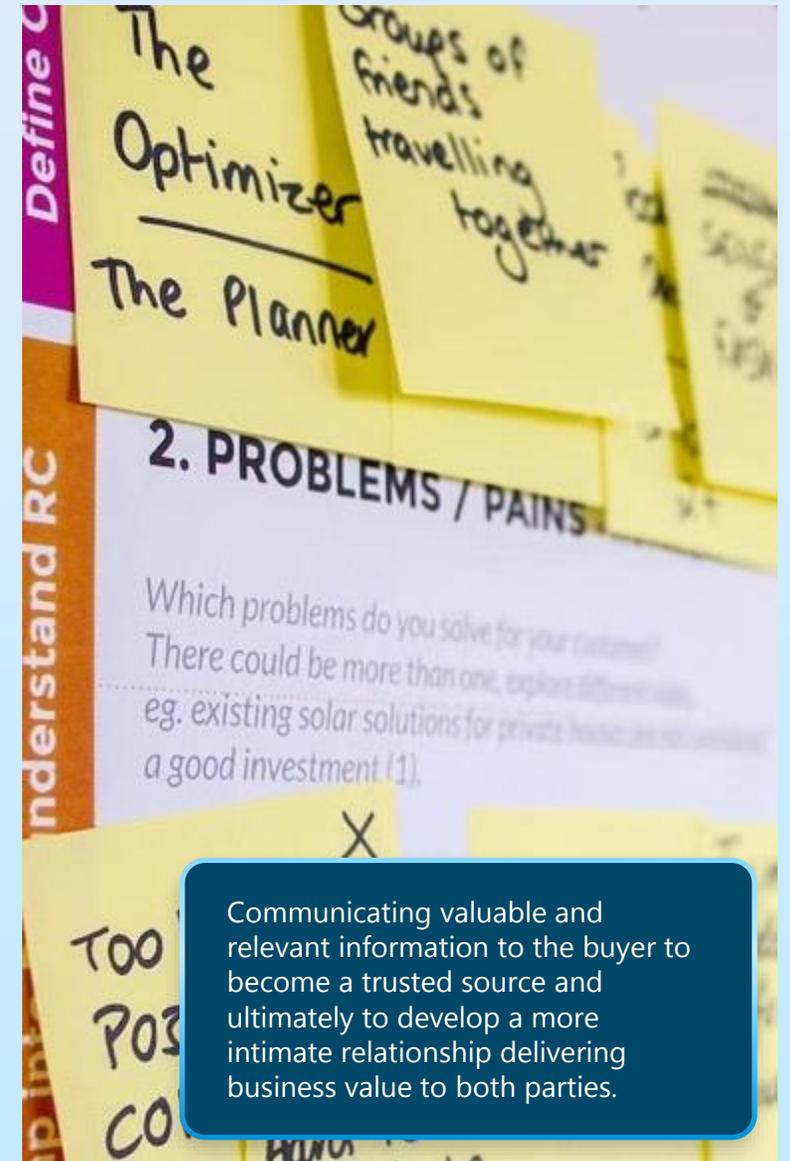


1. Market Messaging

Being heard.

To express it simply, the goal of sales and marketing in today's world is to initiate and engage in an intelligent conversation. One that brings clear value to the buyer. Gone are the days when there was a need to talk all about the offering – that's done by the website now. Rather, successful communication must be personalized and relevant to the audience. This can no longer be generic messaging but must be carefully crafted exchanges of information that the buyer sees as relevant and useful to their situation. To meet these goals, messaging must be tuned to the individual's role, where they are in their buying journey, and delivered in a manner that they will easily access to consume the information. The goal is not to simply broadcast information at a prospective buyer, but to forge a more intimate relationship where the buyer views you as a trusted source of valuable and relevant information and, indeed, a trusted advisor.

To achieve this goal, it must start with an in-depth understanding of buyer, as was described in Step 2 of Scoping, i.e., gaining the Outside-In™ perspective and knowing the dynamics of the buying journey. Without such knowledge any attempt at develop the messaging architecture is likely to be heavily compromised.

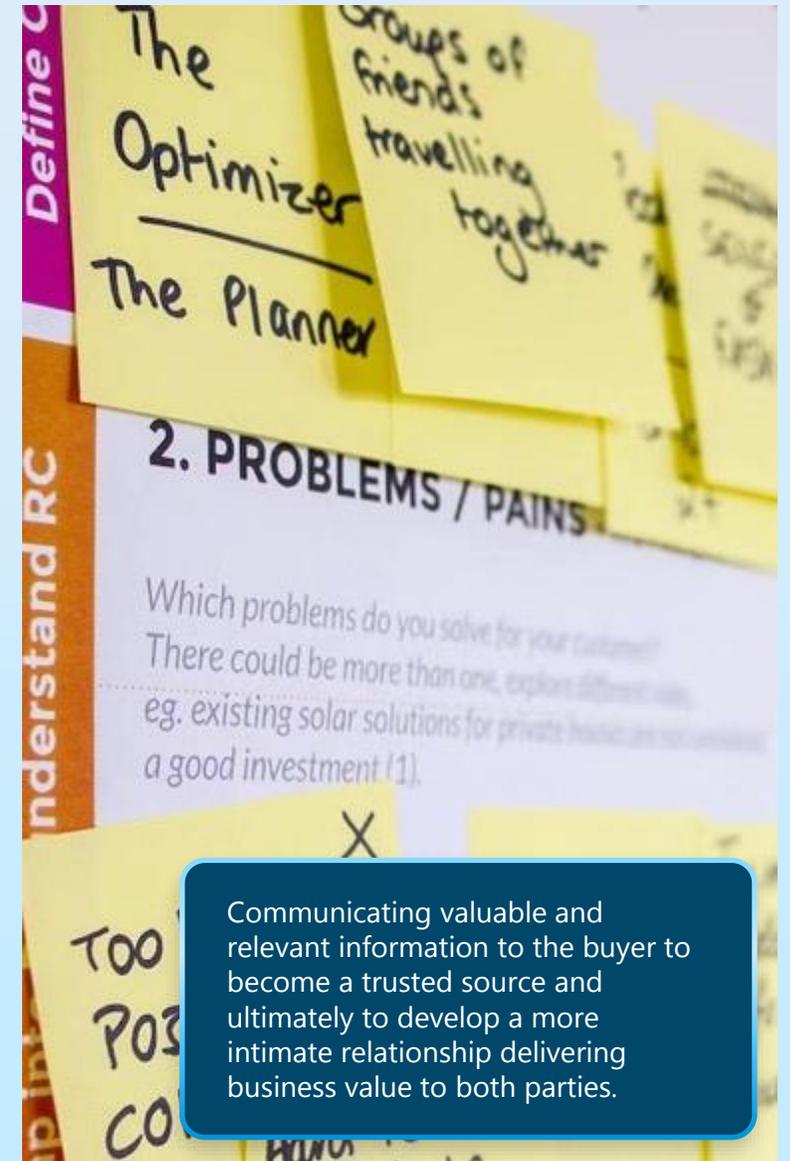


1. Market Messaging (Continued)

Being heard.

It is recommended that a market messaging matrix be developed to carefully craft message themes that match to the various key players and personas through the buying journey. The message themes should be crafted to be relevant to the activities and value drivers at each step. It will also be found that addressing the buying concerns, by player at each step, becomes a primary goal for market messaging. In fact, messaging aimed at mitigating buying concerns is often more powerful than those that simply amplify the value propositions.

The market messaging themes must also reflect the overall Market Engagement Strategy that was developed at the third step of Scoping, i.e. The Vision of the Future. This is where the vision of how to engage with a buyer gets put into practice. It will be found that developing this type of messaging architecture is a far cry from simply creating clever tag lines and well-honed value propositions. This exercise represents a far more precise approach to conversing with a buyer, not simply broadcasting slogans at them.



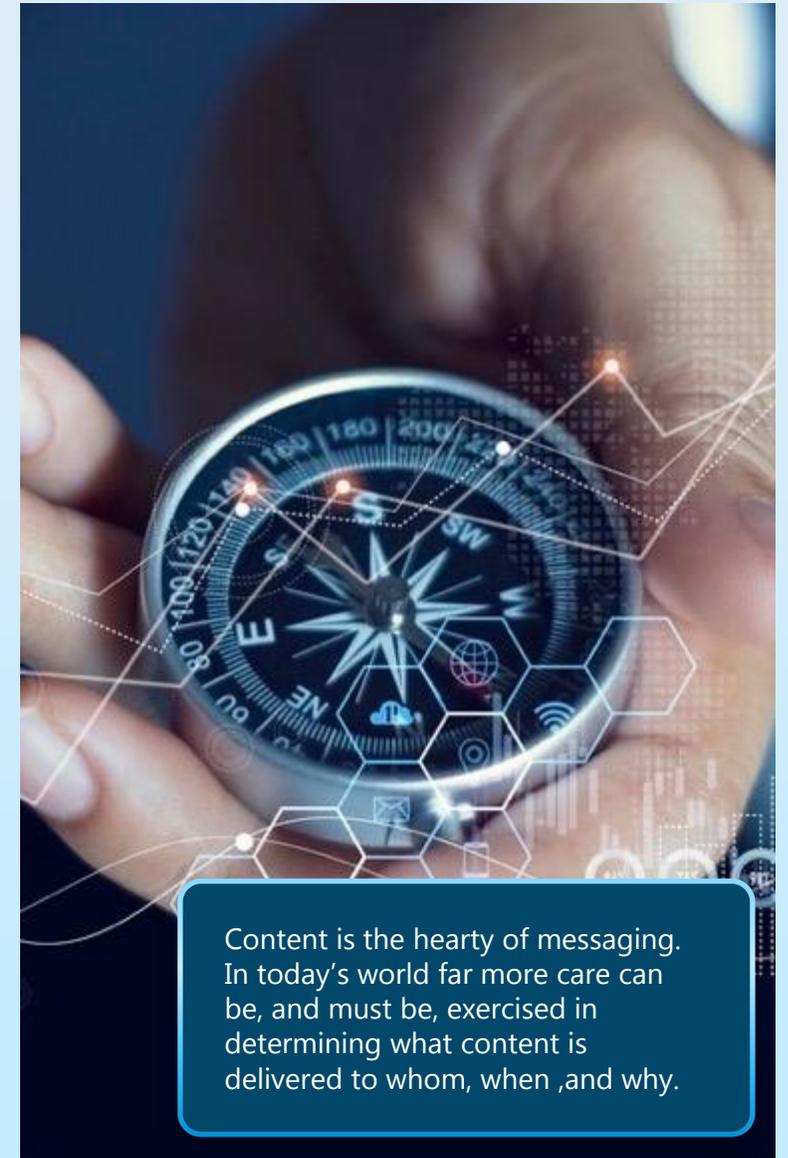
Communicating valuable and relevant information to the buyer to become a trusted source and ultimately to develop a more intimate relationship delivering business value to both parties.

2. Buying Journey Navigator

The map for how customer-facing roles will successfully navigate the buying journey.

For the customer-facing roles a tool should be developed to help them navigate the buying journey. It starts with identifying where any buyer is in their journey. Then, based upon where the buyer is in their journey, or even that they are not in a buying journey, the Navigator provides the series of optimal activities in which to engage. The Customer Buying Journey Navigator essentially translates the market engagement strategy into a series of roles, responsibilities and actions. In some ways this process replaces the old sales process and switches to focus from trying to pull a buyer through the sales process to supporting them across their buying journey. It should provide a scalable, predictable and measurable approach to revenue generation.

For each step in the buying journey the Navigator details who does what and how. Roles are defined together with responsibilities and the hand-offs between these roles. As the process of buyer engagement is a two-way street the Navigator details what information or commitments should be gained from the buyer at each stage and then what information or commitments should be given.



Content is the hearty of messaging. In today's world far more care can be, and must be, exercised in determining what content is delivered to whom, when, and why.

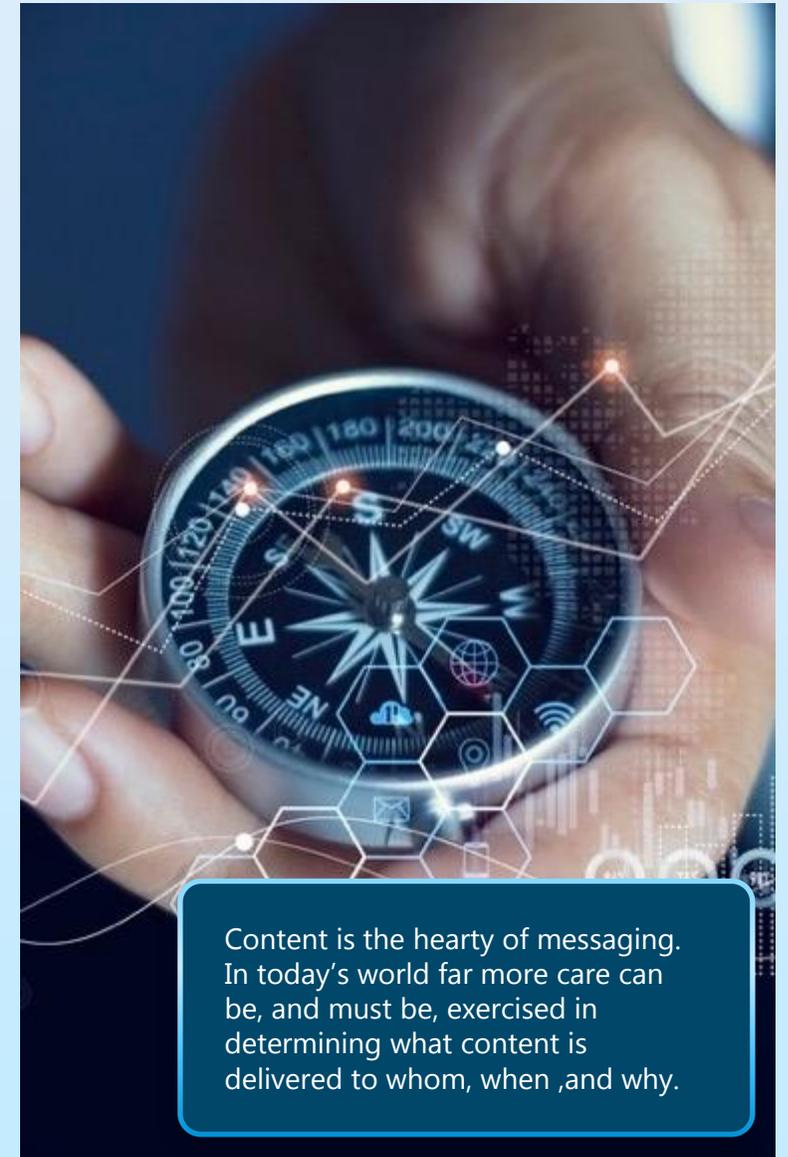
2. Buying Journey Navigator (Continued)

The map for how customer-facing roles will successfully navigate the buying journey.

The basis of developing the Customer Buying Journey Navigator is, of course, the mapped stages of the buying journey together with the market engagement strategy – both of which were developed earlier in the Blueprint Process. We highly recommended that the front-line resources be highly involved in developing the Navigator. They are, after all, the folk with the most knowledge of what actually happens and indeed should happen. We find a lot can be gained from inviting them to embrace a totally unconstrained thought process to envision the very best way in which to interact with customers and to achieve the desired outcomes. We also strive to build in professional and industry best practices across the spectrum of activities detailed by the Navigator.

Once developed, the Customer Buying Journey Navigator becomes the playbook. Other aspects of the Revenue Enablement Framework can then align to the content of the Navigator. These would be designed and developed at the next stage of the Blueprint for Success.

The Customer Buying Journey Navigator also becomes the primary coaching tools for sales leaders to utilize with their sales teams.



Content is the hearty of messaging. In today's world far more care can be, and must be, exercised in determining what content is delivered to whom, when, and why.

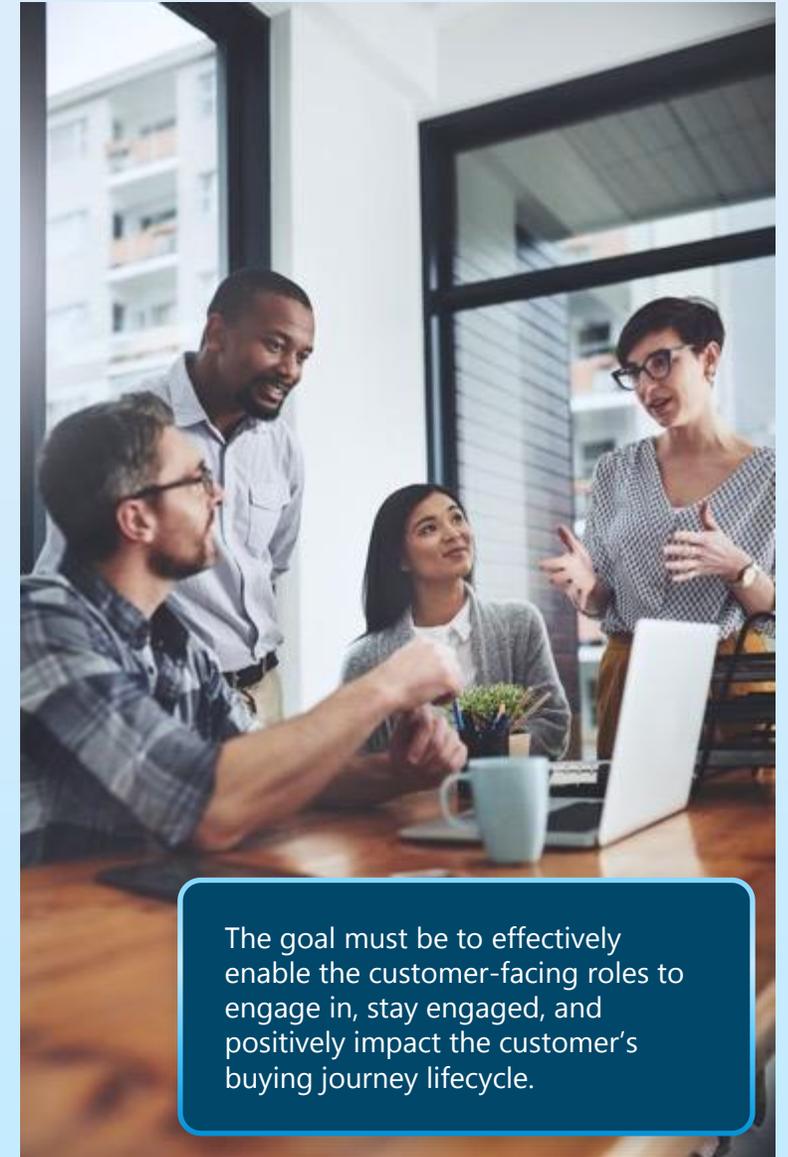
3. Enablement

Successfully getting to, and past, the start line.

The Ramp Plan, developed as Step 5 of the first phase of the Blueprint, laid out what will be required for success in terms of People, Processes and Technology. This step is to develop all that is required in terms of the People and the Processes. Technology will be the focus of the fifth step of this phase of the Blueprint.

This step of the Blueprint for Success starts with completing the Outside-In™ Revenue Generation Framework. Building upon the market's buying journey, the market engagement strategy, and the Buying Journey Navigator, for each step of the buying journey we would then consider:

- Skills, Knowledge, and training
- Tools
- Content/Collateral
- Cadences and key metrics
- Methodologies



The goal must be to effectively enable the customer-facing roles to engage in, stay engaged, and positively impact the customer's buying journey lifecycle.

3. Enablement (Continued)

Successfully getting to, and past, the start line.

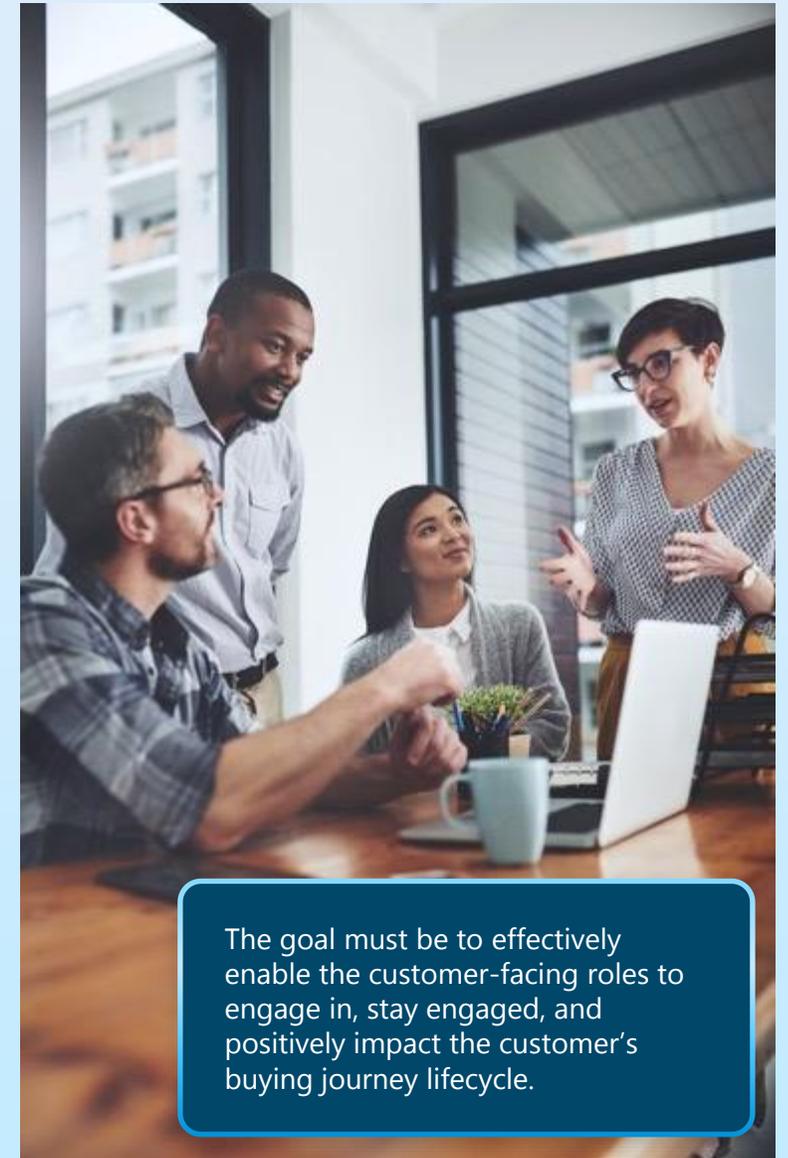
Process

- Among the enabling processes that should be considered are playbooks, methods and approaches for all interactions with prospects and customers, in accordance with the Buying Journey Navigator. There should be specific cadences for customer engagement which may vary by aspects such as market, geography, or use case. Internal processes that support the front one resources should also be considered, and service level agreements (SLAs) between various functions and roles across the organization.
- Metrics and measurement should be considered and established so that performance can be measured, managed, and optimized.

People

- Enablement starts with how to organize around the roles and responsibilities and then establishes what skills and knowledge will be required for each role. Training should be designed that delivers required skills and knowledge in a targeted fashion so that each person receives the training, or access to knowledge, required where, when, and how they need it.

Leaders should also receive the training and support they will need to support and reinforce new approaches. Customer-facing roles should also be trained on, and competent in the use of, the Customer Buying Journey Navigator.



The goal must be to effectively enable the customer-facing roles to engage in, stay engaged, and positively impact the customer's buying journey lifecycle.

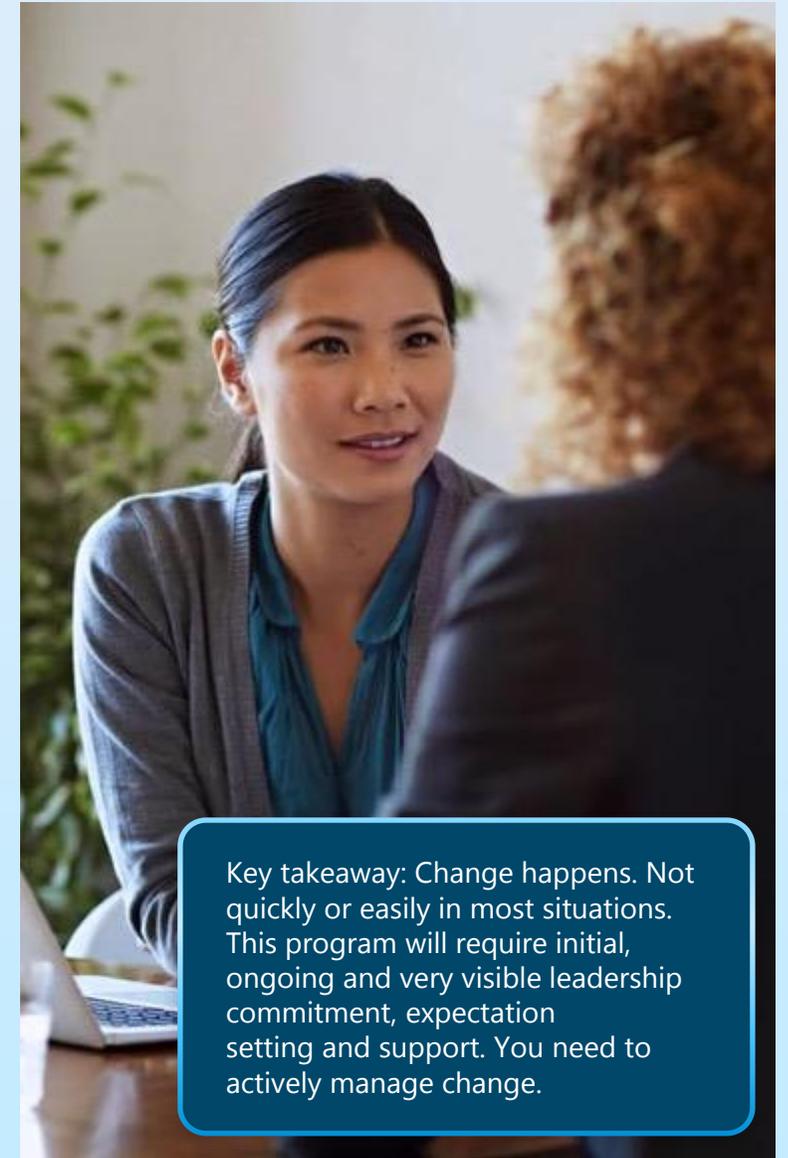
4. Change Management

No matter how small the change maybe, it requires managing.

The starting point for any change management is to accept the fact that people don't behave logically. They don't simply flock to what is good for them. No matter what the benefits may be of the new technology and approach, don't expect everyone to be enthusiastic about adoption. The good news, however, is that this behavior can be both predicted and managed. For example, we know some 10% of the general population will be eager to try something new, and we also know that some 10% will only do so when they have no alternative. We also know that different segments of the users will be motivated to adopt for different reasons. This all calls for a deliberate approach to gaining adoption across the origination.

The change management plan must consider:

- Who are the roles that will be impacted by the new system and approaches, what is their motivation, and what are their anxieties? Anticipate them and prepare to handle them.
- Develop plans to support change. An example of this would be sharing success stories at weekly sales meetings or QBRs. Show success and celebrate it. It's contagious. Ensure leadership and the program sponsors remain highly engaged and actively supportive of the program.

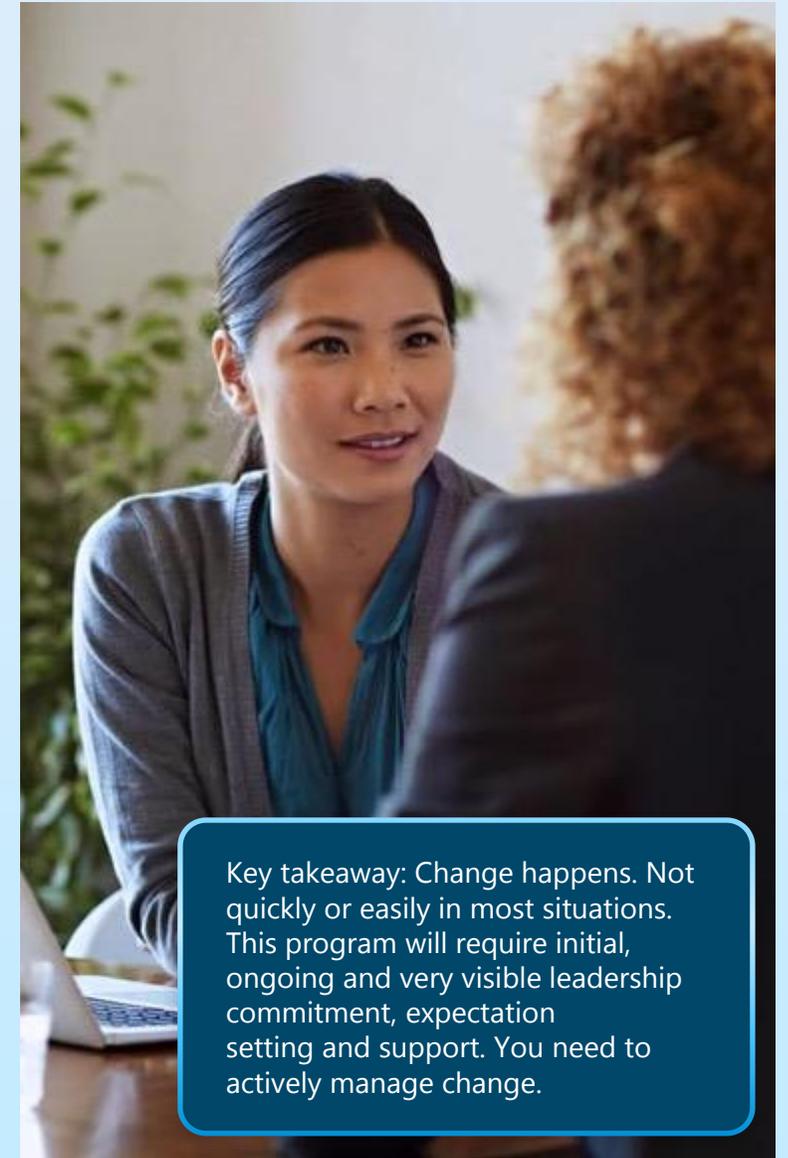


Key takeaway: Change happens. Not quickly or easily in most situations. This program will require initial, ongoing and very visible leadership commitment, expectation setting and support. You need to actively manage change.

4. Change Management (Continued)

No matter how small the change maybe, it requires managing.

- We strongly advise using an Early Adopter approach where the rollout is phased to start with willing participants. Even in small organizations, the value of starting with Early Adopters can pay great dividends. Its worth highlighting that such a phased implementation is not the same as a pilot ,and need not take more than a few weeks, but it provides all important feedback and the success stores for the successful ongoing rollout.
- The Communication Plan which should detail what should be communicated to whom and by whom. A vital part of the communication plan is also ensuring that there are viable channels for which to gain feedback from the users.
- Visible leadership commitment is critical to drive change. Once again, this should be deliberately built into the plan and managed.



Key takeaway: Change happens. Not quickly or easily in most situations. This program will require initial, ongoing and very visible leadership commitment, expectation setting and support. You need to actively manage change.

5. Technology Configuration

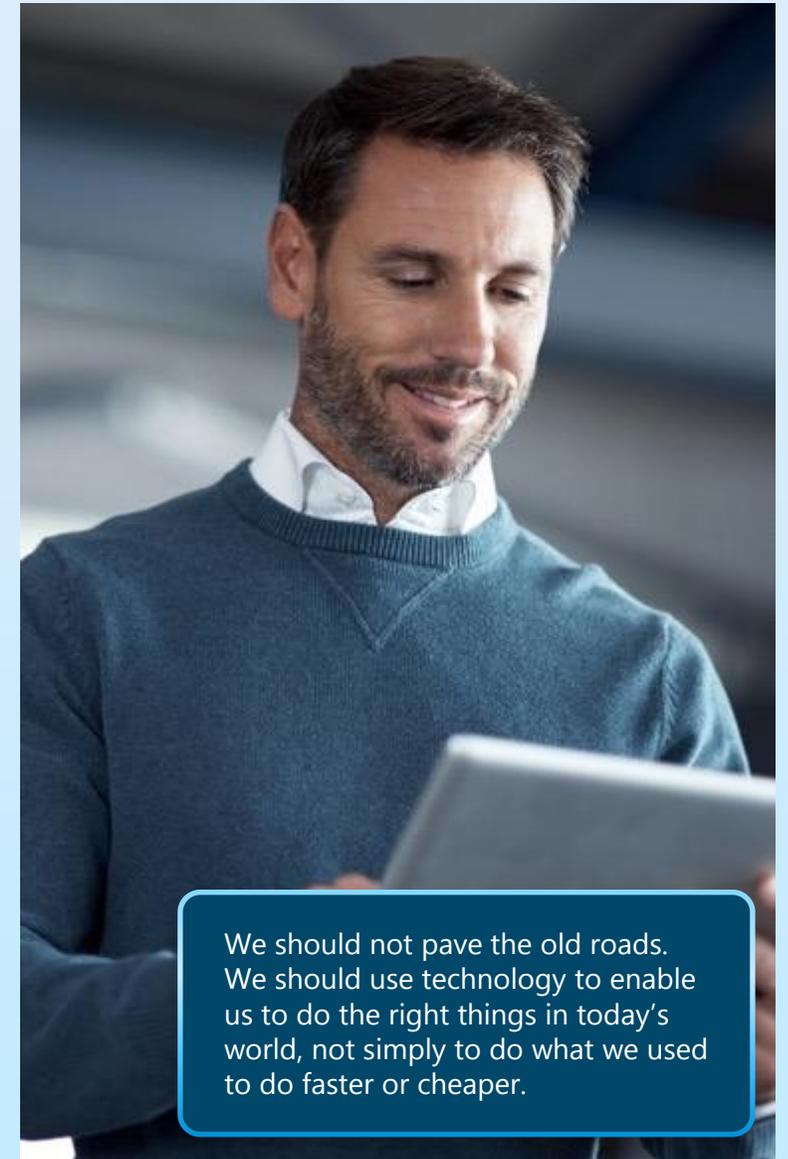
Designing and developing the engine for success.

Technology has served as a key enabler for the success of customer-facing roles for decades. Work processes are managed, information is made easily available, effective communication is accelerated, and analytics used to optimize processes. However, technology can also become an encumbrance. Technology must be designed and deployed with great care. Consideration must be given to how users are expected to utilize the technology and how technology will not just integrate with other technologies but how they will integrate into the workstreams.

Once again, the configuration and deployment of technology should support the activities that are part of the Customer Buying Journey Navigator. The Outside-In™ Revenue Generation Framework shows the roles, responsibilities, activities, information flows, tools, and training that are required at each step of the specific market's buying journey lifecycle. Technology should support this work, and wherever possible, either eliminate or make that work more efficient and effective.

The focus should always be placed on the vision and how we want to, or must, engage with today's buyer, at each stage of their buying journey lifecycle. It's not a case of doing what we used to do better, we must leverage the technology to do what we need to do to effectively engage, and stay engaged, with the buyer at each stage. Some of these interactions may be totally digital, while in other cases the technology is used to support the customer-facing roles.

Artificial intelligence can be leveraged to reduce time-consuming tasks and provide information that is required, when, where and how it can be best used.

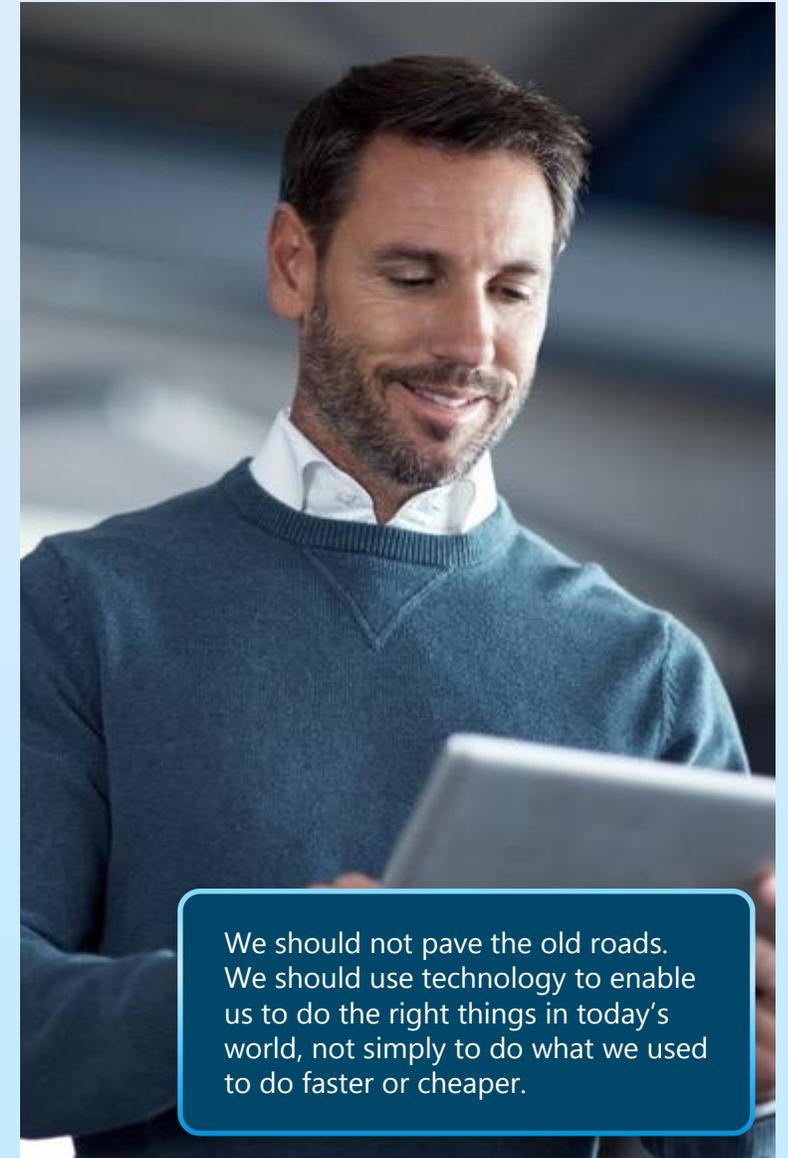


We should not pave the old roads. We should use technology to enable us to do the right things in today's world, not simply to do what we used to do faster or cheaper.

5. Technology Configuration (Continued)

Designing and developing the engine for success.

This is the key distinction of this blueprint – technology implementation must go beyond standard setup, branding, integrations, reporting and training. While these activities must still occur, for optimal success everything must be designed and configured from an “outside-in” perspective...the customer buying journey must be the foundation.



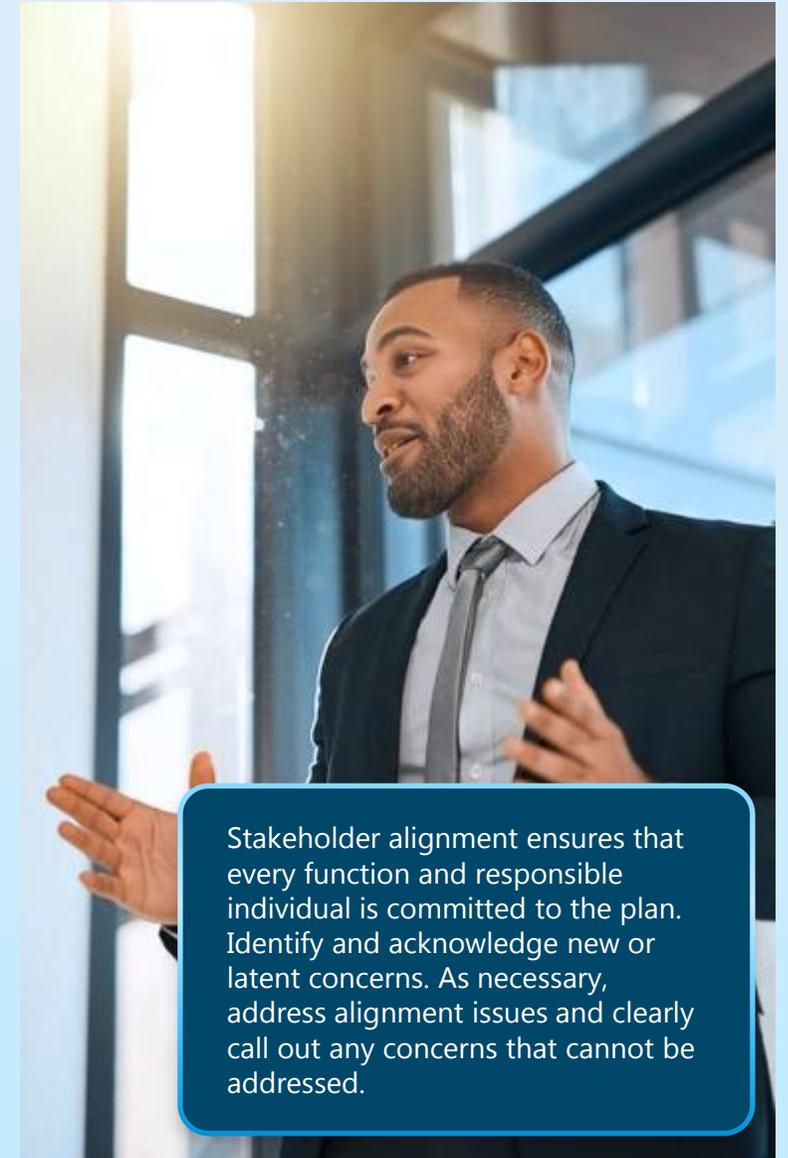
We should not pave the old roads.
We should use technology to enable us to do the right things in today's world, not simply to do what we used to do faster or cheaper.

6. Stakeholder Alignment

Ensuring all the players are in place before the start of the game.

Now that the system is ready to rollout, a final review with the stakeholders is held. This review ensures that the stakeholders are still aligned based on the agreements reached during the Stakeholder Alignment phase of the Scope & Strategy phases.

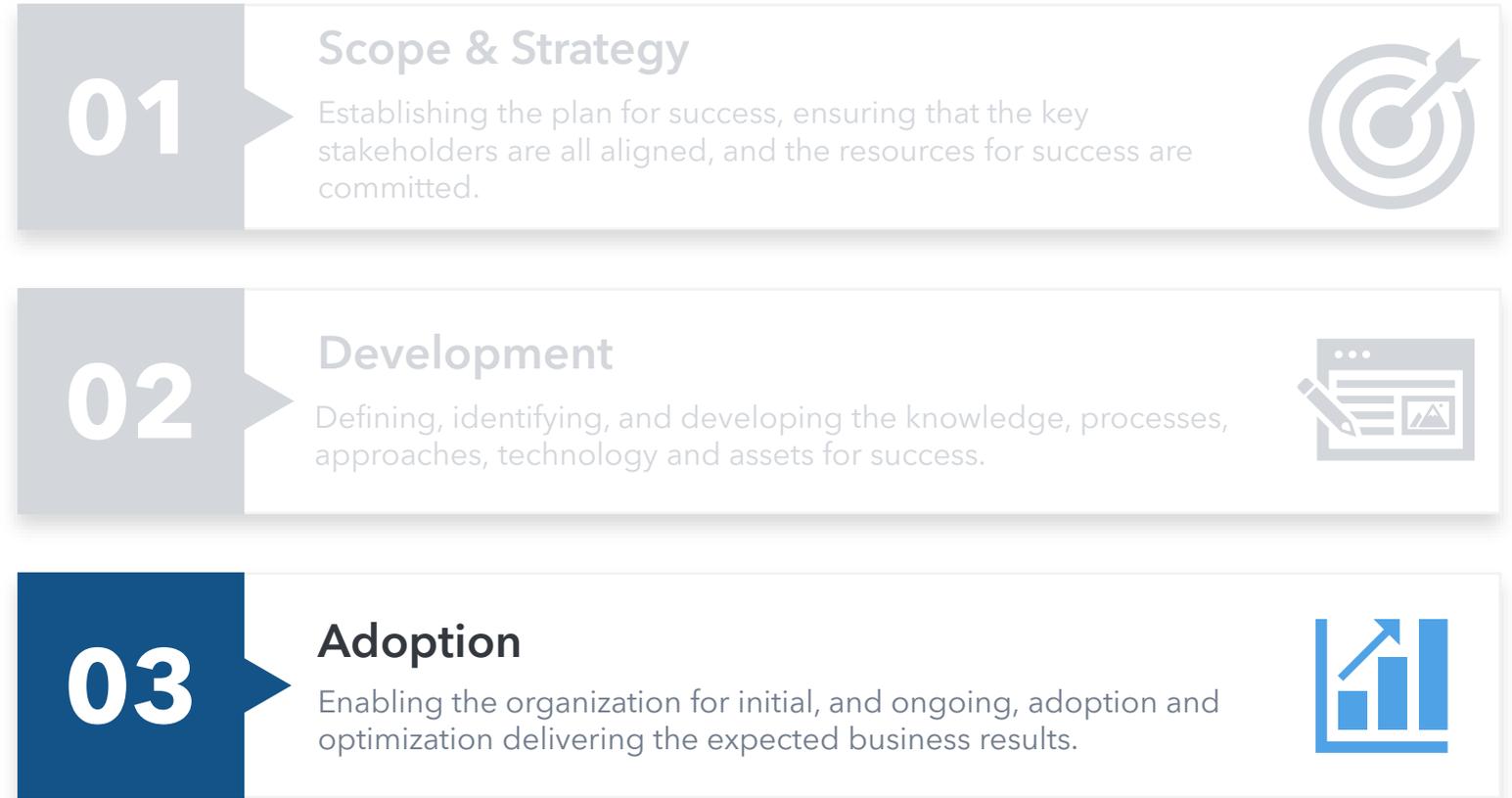
1. Identify any new objectives and concerns
2. Review roles and responsibilities
3. Verify resources required
4. Review and agree to governance requirements and responsibilities
5. Review and agree to internal communication plan and rollout plan
6. Commit to alignment



Stakeholder alignment ensures that every function and responsible individual is committed to the plan. Identify and acknowledge new or latent concerns. As necessary, address alignment issues and clearly call out any concerns that cannot be addressed.

The Blueprint for Success

Three Phases



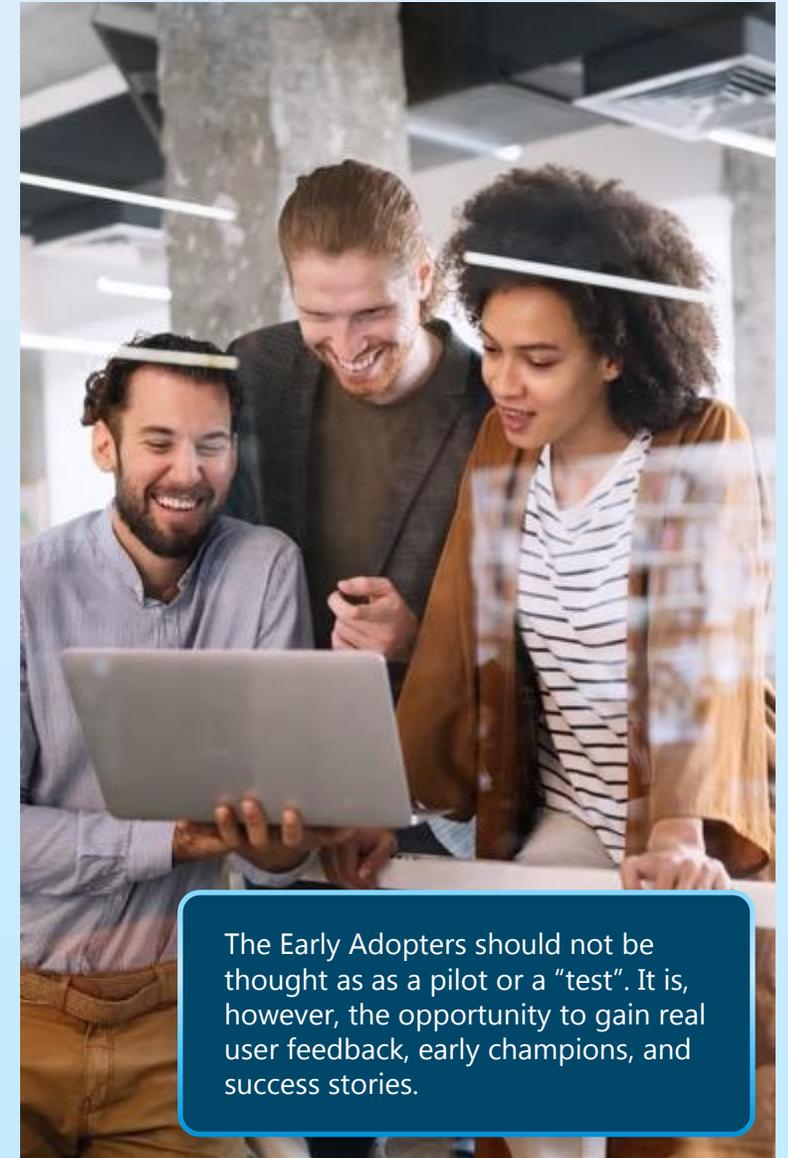
1. Early Adopters

Launching with a control group.

This phase, and the next phase (Benchmark) are optional, but highly recommended.

It is important to stress that this phase is not a pilot. You don't want to signal to your teams a lack of commitment to the project. Rather, the Early Adopters program is simply a step in the broader organizational rollout allowing for identification and remediation of gaps, to obtain success stories and to create an influential group of supporters. It will include all the steps involved in the larger rollout, but with a limited size control group. Key to the success of this step is selecting the right individuals to participate. The selected individuals should be those that have a natural motivation to try something new and provide feedback. In most cases these Early Adopters should self-select.

The Early Adopted step consists of the following activities, which reflects the plans for the wider rollout.



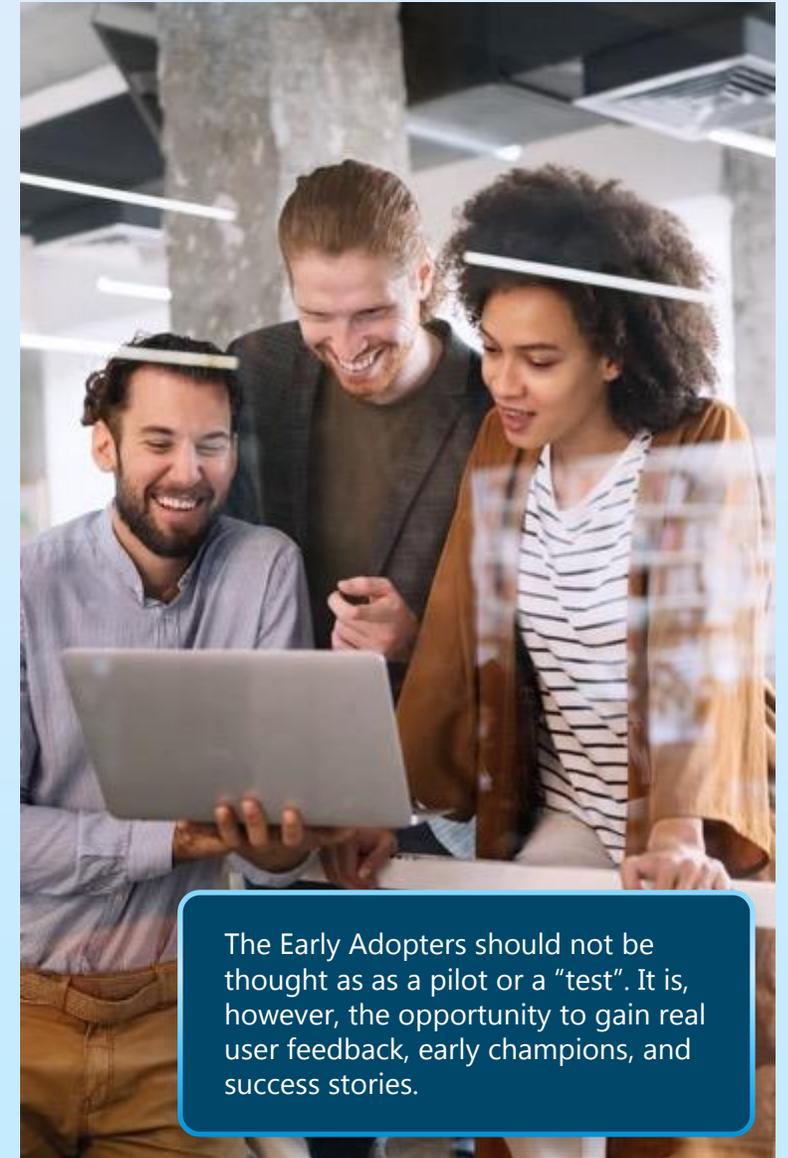
The Early Adopters should not be thought of as a pilot or a "test". It is, however, the opportunity to gain real user feedback, early champions, and success stories.

1. Early Adopters (Continued)

Launching with a control group.

The Early Adopted step consists of the following activities, which reflects the plans for the wider rollout.

- Identification of the control group members
- Training and communication
 - The Why for the program, including the Voice of the Customer and the Vision of the Future
 - The envisioned changes
 - As appropriate:
 - How to navigate the buying journey
 - Initiating and managing the customer conversation
 - Introduction to the Customer Buying Journey Navigator
- Technology Orientation
 - Leadership commitment – inspection and expectation
- Feedback
 - Identify and share successes
 - Troubleshoot hot spots



The Early Adopters should not be thought as a pilot or a “test”. It is, however, the opportunity to gain real user feedback, early champions, and success stories.

2. Benchmark

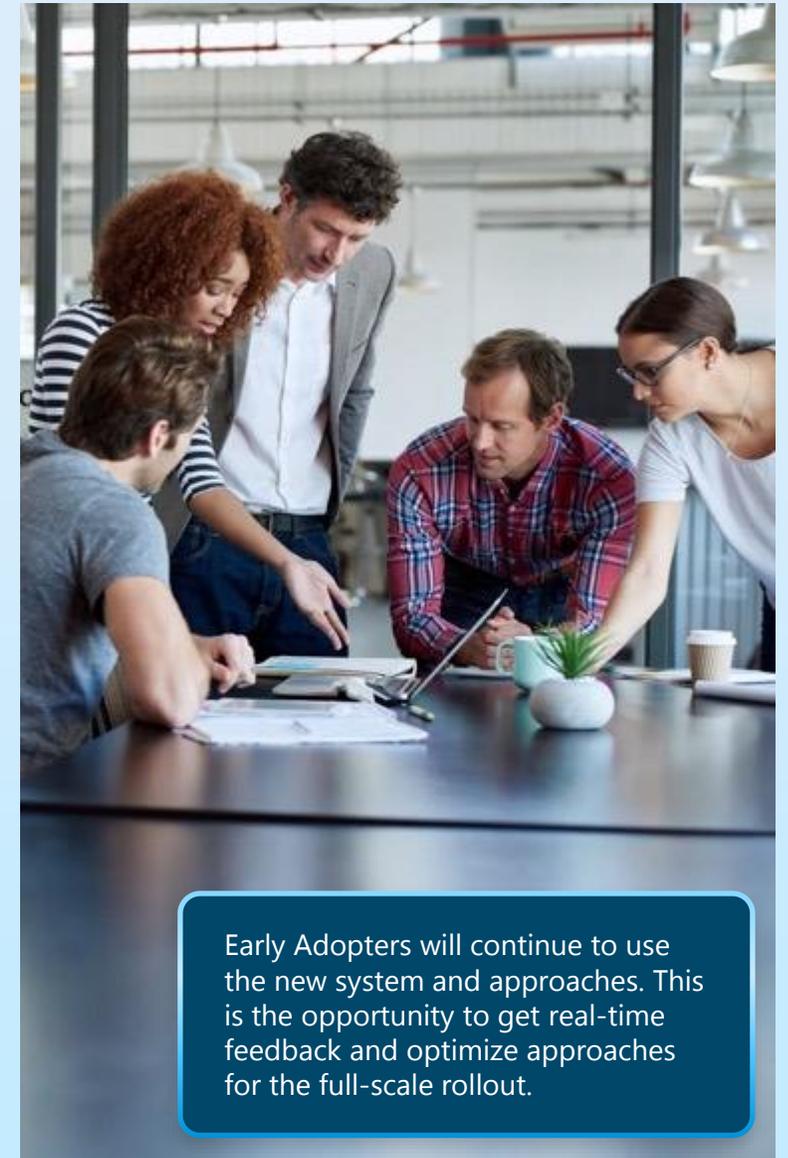
Learning and developing.

The Benchmark step delivers the findings and assessments of the Early Adopter program and provides the roadmap for any course corrections that may be required.

Analytic dashboards are the primary source of truth for data-based observations, assessments and decisions, but don't stop there. Interview the participants to glean insights and success stories.

1. What worked well and what improvements would the individuals recommend?
2. Identify any red flags to successful adoption and bring them to resolution before proceeding
3. Gather specific success stories and attribute them to specific individuals and customers/prospects
4. Compare the analytics from the adoption dashboards to the feedback and success of the individuals involved to establish targets for usage and guardrails for identification of risks

Finally, secure the alignment and commitment of the early adopters to be ambassadors throughout the Adoption program phases.



Early Adopters will continue to use the new system and approaches. This is the opportunity to get real-time feedback and optimize approaches for the full-scale rollout.

3. Launch Readiness

Preparing for the big game.

Launch readiness simply involves insuring all the pieces are in place for a successful launch and ongoing adoption. The following aspects of the program should be reviewed one final time before organizational rollout.

1. Stakeholder and leadership commitment
2. Phasing and timing plan – geographies, groups, products/solution categories, industries etc. (if required)
3. Buyer's Journey Map and Navigator
4. Communication plan
5. Change management plan
6. Training plan
7. Final system configuration readiness check

You have now set the stage for roll-out. Pull the implementation team together to celebrate the achievements made to this point.



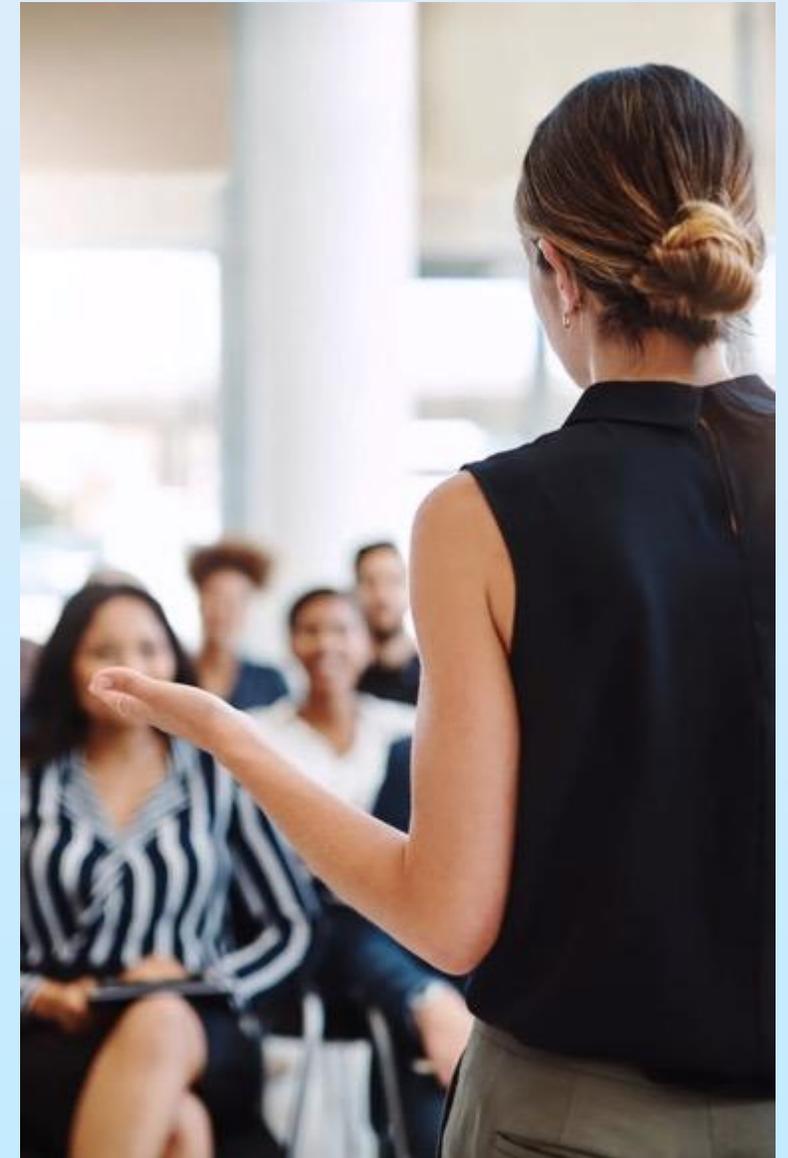
4. Rollout

Over the start line.

Now it's time for all your work to go into action and to payoff rapidly and sustainably.

The rollout activities now begin.

1. Organization-wide communication
2. Sales tools including, as appropriate, the Buying Journey Navigator
3. Sales training
 1. Training assets distributed
 2. Sessions scheduled
4. Supporting roles training
 1. Governance and currency of content
 2. Expert training
 3. Publication and activation training
5. Change management plan executed
6. GO LIVE



5. Support

Feeding and caring for the new baby.

This step and the next, Optimization, are BFFs and will go hand-in-hand together, forever. While you've anticipated so many factors and planned for them throughout the implementation, there will be things that you simply could not see. Market changes, ongoing observation and learning and perhaps even a global pandemic may require changes to the program. Not to worry, your solid plan and execution, combined with an effective change management plan, will continue to ensure success.

Establish clear organizational responsibilities for:

1. Ongoing program management
2. End-user support
3. Ongoing training and reinforcement
4. Leadership training and support for coaching and reinforcement

It is also important to have chosen an implementation partner that is equipped to provide ongoing support and optimization of the sales and marketing approaches. Remember, this is not just about the technology, it's about changing your organization to think Outside-In™, rather than inside-out, to deeply understand your buyer's motivations, their key activities, who gets involved, their buying concerns, and their decision-making approaches.



6. Optimization

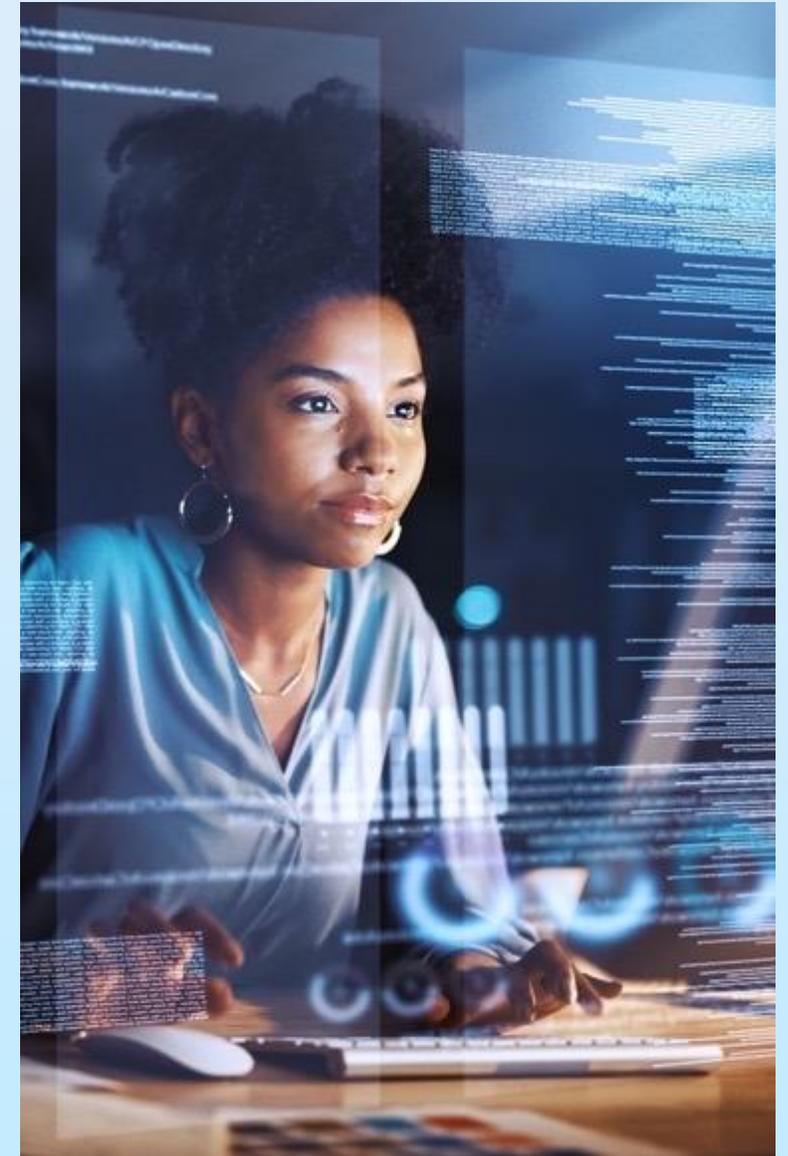
Learning and growing.

When you set out on this journey, your key motivations were focused on substantially and sustainably improving business results. It wasn't about implementing a system or simply making the lives of your sellers easier or providing Marketing with the better tools. It was about changing the future...achieving measurable results in revenue, profit and other KPIs.

We believe in bringing together both the quantitative and the qualitative aspects of the system. Analytical dashboards provide the unarguable data and facts, then the feedback from the front-line, and especially from customers, can reveal the story behind the numbers. Measuring and optimization should be a continual process that identified emerging best practices, market trends and pinch points that represent opportunity for refinement.

Measuring and managing all customer-facing activities and then matching these with results will reveal trends that lead actionable insights:

- Sellers will be able to see the engagement they are having with prospects and customers and take the necessary action to facilitate progression of the journey.
- Marketers will be able to easily see the impact of each piece of content and build more compelling content.
- Service and support approaches can be matched to customer satisfaction.

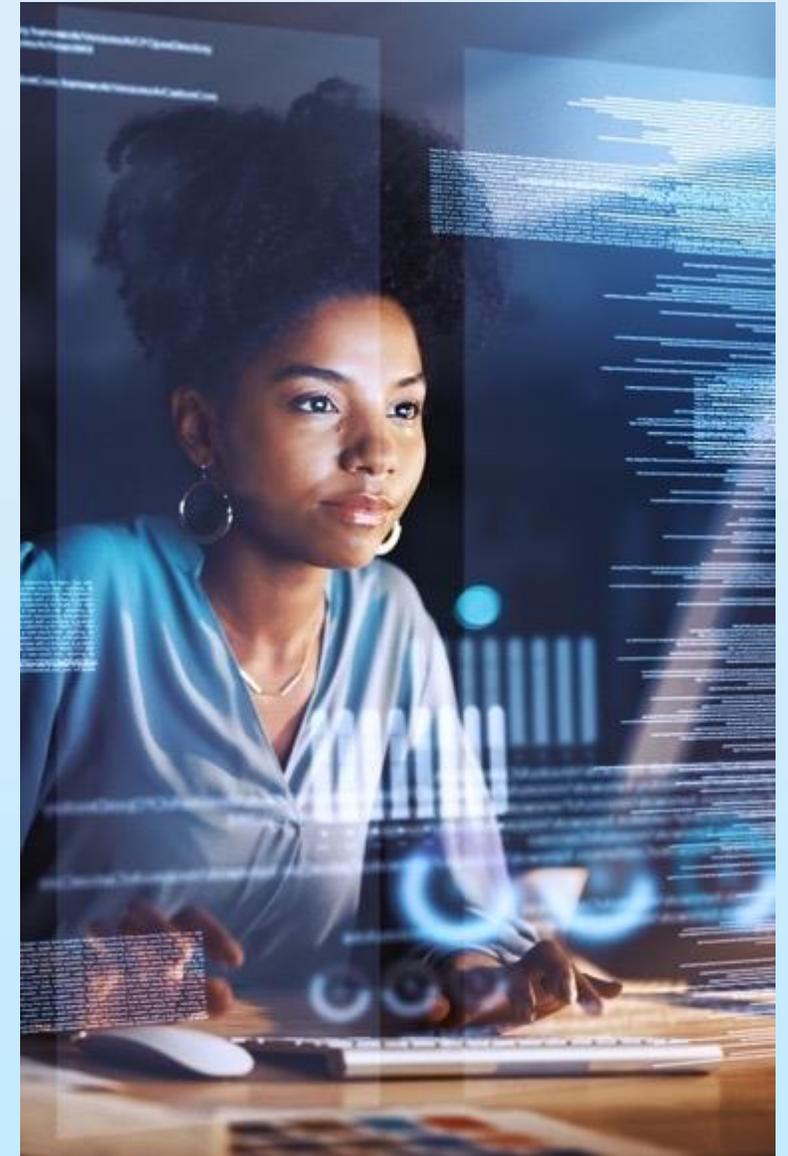


6. Optimization (Continued)

Learning and growing.

- Leadership will be able to see how individuals, groups, products and industries are performing and establish benchmark KPIs for the entire organization.
- Everyone will benefit from the best practices observed and established.

Learn and grow with a closed-loop, ongoing focus on optimization.



Blueprint for Success

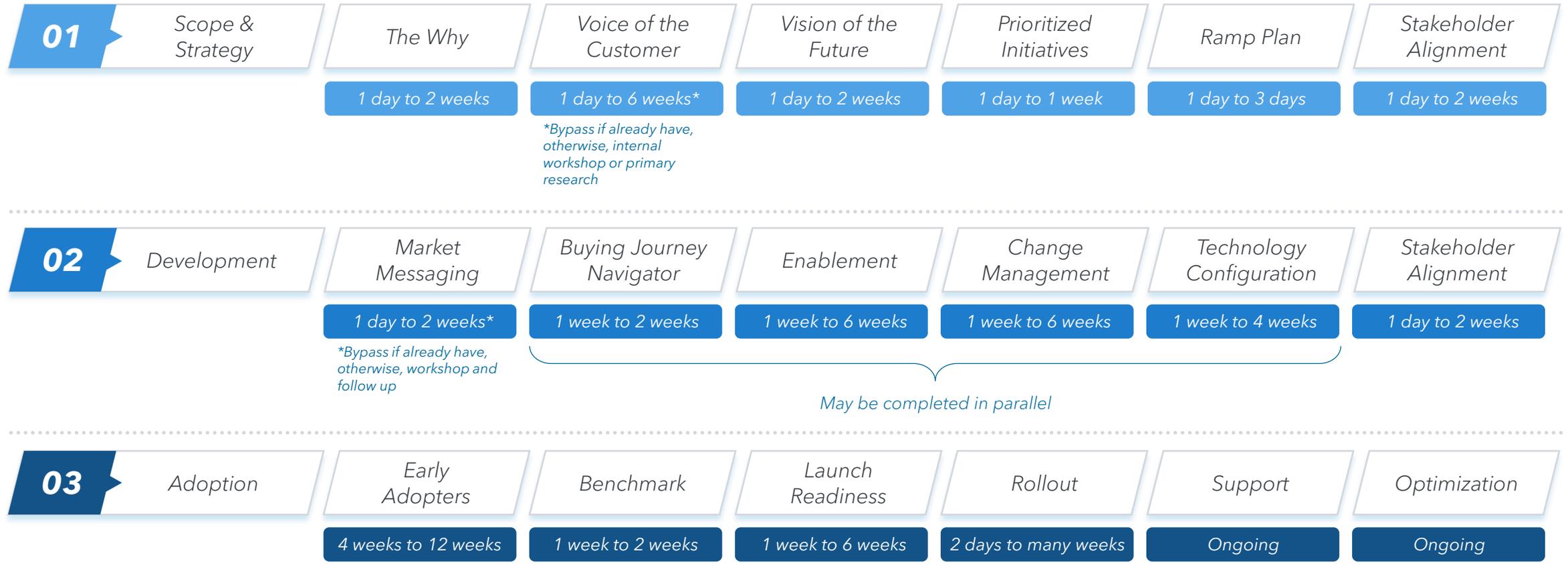
At a glance



Timelines

90 days or less to implementation

At a glance



Best Practices

This Blueprint for Success naturally embraces the best practices for a successful adoption. However, we considered it worthwhile to summarize them here.

1. Outside-In™

- Everything being grounded in the specific market's buying journey
- Focusing on the buying journey; not the product
- Focusing on the buying journey; not the sales process
- Clarity and focus on how you will add value and relevancy to each role, at each step, of the specific market's buying journey

2. Precision Sales and Marketing

- Aligning sales and marketing to each key role, across each step, of the buying journey

3. Change Management

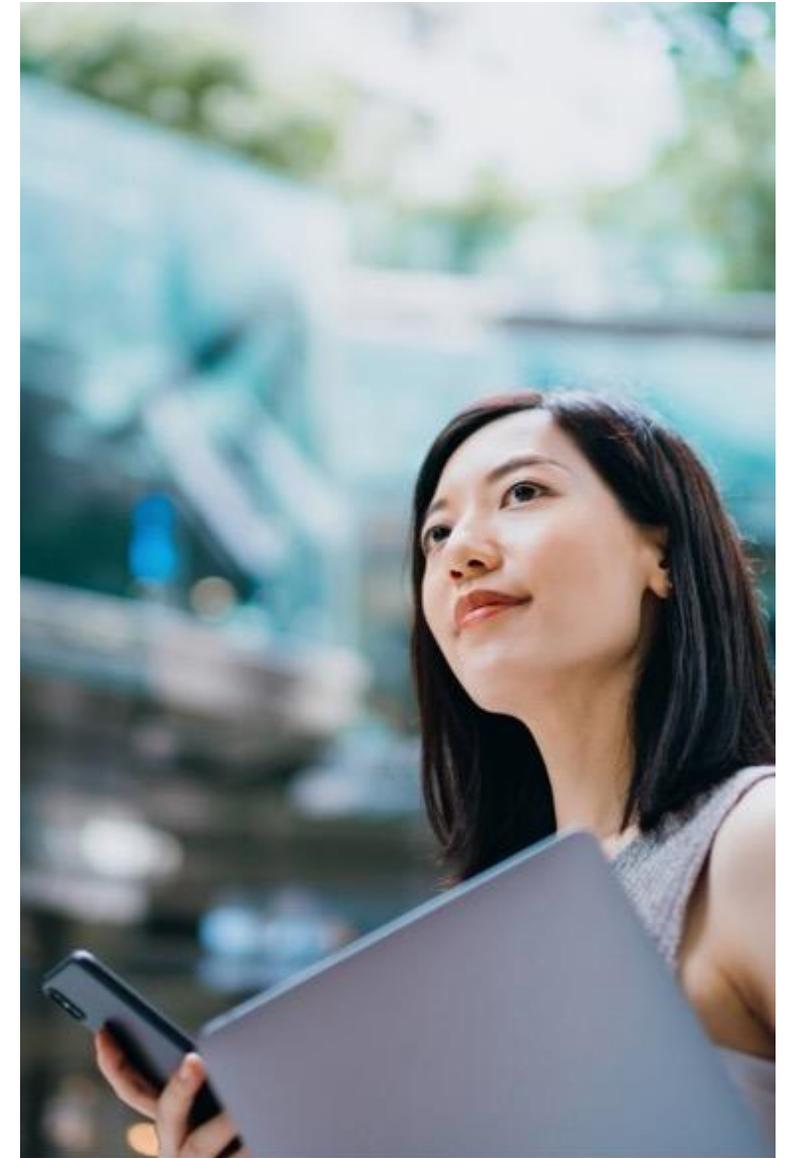
- Surrounding the project with change management

4. It's Not Just About Technology

- The scope must include considering the processes, the people, the content, and enablement

5. Stakeholder Alignment

- Gaining the active involvement, alignment, and commitment of all the roles and functions impacted or involved



Best Practices

6. Scope

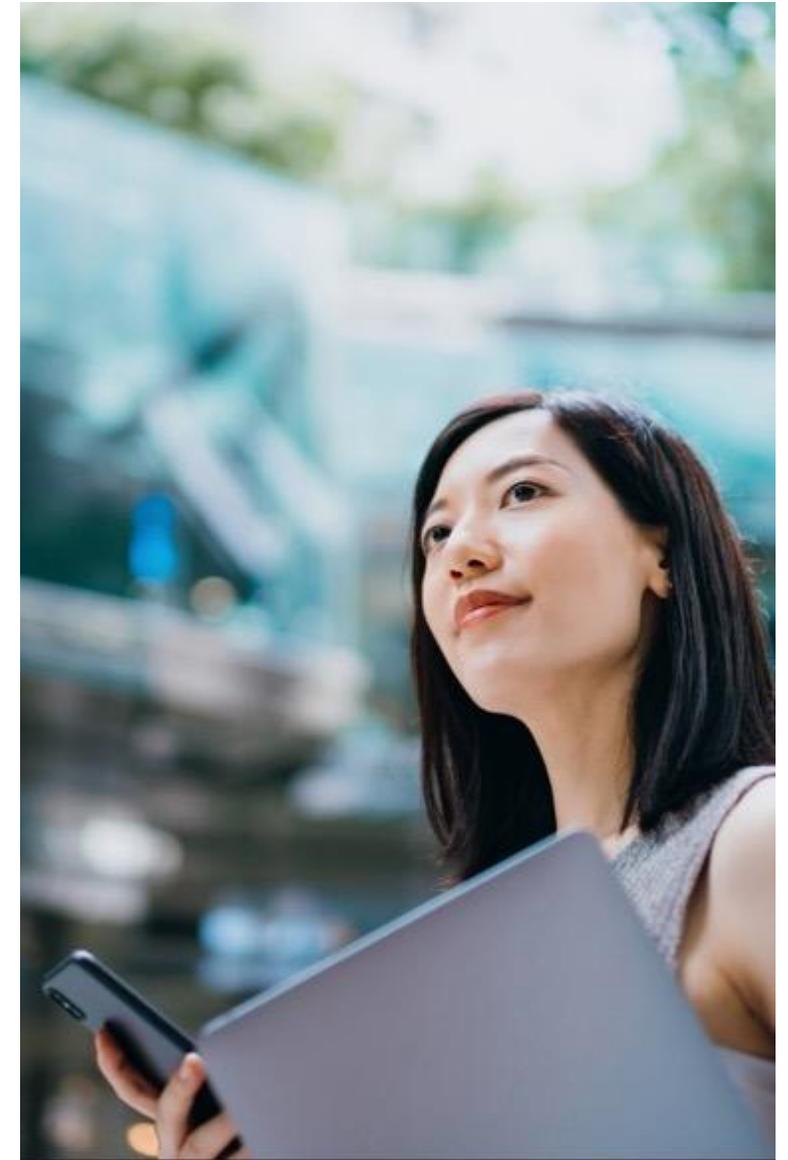
- Getting the original scope in the goldilocks zone, just right, - not too big, not too small i.e., big enough to make a difference

7. Outcomes Based

- Agreement on the business results expected and using these to drive the project

8. Analytics

- Using analytics to form the feedback loop for ongoing learning and optimization



What Could Possibly Go Wrong?

Transformational projects have a habit of taking unexpected twists and turns. Users don't quite behave the way logic may dictate, the number of variables that must be dealt with tends to increase exponentially, and change management plays an ever increasingly important role. Needless to say, when dealing in the area of revenue generation the number of potential challenges tends to increase. This Blueprint for Success has been developed as a result of witnessing multiple projects in the revenue enablement arena. It has been specifically designed to mitigate the challenges, and to plan a successful project that delivers the anticipated business results. Nonetheless the table below expends on the areas of challenge that we have seen most often compromise success.

Challenges	Mitigation
Cross-Functional Alignment	Sales enablement projects tend to cross many boundaries, including the infamous sales and marketing functions. It is critical that appropriate representatives are active throughout all stages of the program. We don't want last-minute vetoes and we do want different perspectives throughout. By grounding the strategy and adopting the Outside-In™ approach, and the true voice of the customer, the project should have more of an objective and external driving force versus internal agendas.
Complexity	Scoping and phasing the project correctly is of paramount importance. Too much change or too much complexity are killers of well-intentioned projects.
Tackling the Wrong Problem	As with any automation, we should always take care not to pave the old roads. We need to make sure underlying processes and systems are working and that we are providing automation to the right challenges in the right way.
Global/Regional Variances	There are always regional differences. Ironically, not as many as most may think. However, it is a vital component of success to recognize and manage regional and operating differences and not assume that one size fits all.
Adoption	Adoption, especially by busy sales folk, is always a challenge. Make sure that it is clear to the sales teams what is in it for them – which should be a lot – and that it is not about training them on technology. It's about providing them with a productivity boost. The Early Adopters approach is key to gaining feedback, developing champions, and getting early wins.
Integration	Sales are already surrounded by many technologies. It is important to ensure new technologies seamlessly integrate with existing applications such as CRM. Single sign on, and the ability to easily access customer data from one source are vital to success.

Significant Results

It should be no surprise, if you can connect with your buyers earlier in their buying journey, and bring distinctive value to their individual situation, you are going to out distance the competition and gain significant results.

- ▶ Revenue Increase: 12 - 20%
- ▶ Sales Win Rates Increase: 12 - 27%
- ▶ Sales Productivity Increase: 15 - 35%
- ▶ Forecast Accuracy Improvement: 100%+
- ▶ Order Size Increase: 17 - 120%

Two Year Impact





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