



REDWOOD ADVISORS

Commercial Diagnostic

*Baseline your current-state
commercial structure and identify
areas for improvement*

Commercial Diagnostics baseline your current-state sales & marketing organizations and identify areas for improvement

Baseline your current-state sales & marketing organizations with a focus on key roles, reporting lines, processes, metrics, and channels; develop a vision for your future-state sales organization and identify and size key opportunities for improvement

Commercial Diagnostics address:

- How does your commercial structure function currently (e.g., roles, tools, reporting lines, etc.)?
 - What works well about your current commercial structure, and what could be improved?
 - What could a target commercial structure look like?
 - What is the opportunity (e.g., potential EBITDA impact) from transitioning to the target-state commercial structure?
- **Develop an optimized commercial organization to accelerate sales** by assessing and addressing key strengths and areas of improvement with your current-state commercial structure
 - **Accelerate and smooth path to a future state sales organization** by clearly understanding your current state sales organization, roles, operating model, etc.
 - **De-risk sales org change management** (e.g., staff attrition, data loss, customer loss) by better understanding current roles, tech, and systems of record
 - **Improve managerial insight and ability to execute** by better understanding current processes and metrics
 - **Build leadership alignment and buy-in for change** by identifying and sizing the key opportunity areas linked to the current state and envisioned future state



Commercial Diagnostics: Process Overview

Phase	Current-State Overview	Future-State Visioning	Opportunity Sizing
Key goal	<ul style="list-style-type: none">• Understand top strengths and major gaps of current org structure	<ul style="list-style-type: none">• Design future-state org model	<ul style="list-style-type: none">• Size the potential impact from key opportunities
Key outputs	<ul style="list-style-type: none">• Codified current-state org structure and systems	<ul style="list-style-type: none">• Clearly articulated vision for a future-state sales org	<ul style="list-style-type: none">• Opportunity impact assessment
Key activities	<ul style="list-style-type: none">• Internal stakeholder interviews• External expert interviews• Current-state org review & synthesis (lines & boxes)• Role overviews• Tools/tech assessment• Acct. mgmt. “systems of record” assessment• Sales process (established & ad-hoc) documentation• Key sales metrics review and documentation	<ul style="list-style-type: none">• Future-state org visioning• Potential future-state sales org model drafting• Key gaps analysis & assessment (e.g., costs, downsides)	<ul style="list-style-type: none">• Top growth opportunity identification & analysis• Revenue analysis by customer tier and category• Top opportunity (~3-5) sizing

