



REDWOOD  **ADVISORS**

GTM Design & Excellence

*Optimize your sales and marketing
orgs. to better serve your customers*

GTM Design & Excellence projects help optimize your sales & marketing orgs to better serve your customers and grow your top and bottom-lines

Optimize your sales & marketing orgs. by crisply defining key customer segments & needs, GTM strategy, sales territories, channel strategy, sales workforce planning, etc. to better serve your customers and grow your top and bottom-lines; develop thoughtful transition plans to move from your current to target-state

GTM Design & Excellence projects address:

- Who are your customers and how do they make purchases?
- What GTM model (e.g., groups, channels, coverage) can best reach your customers?
- How can your sales workforce most efficiently support your GTM?
- What groups, channels, or geographies should you invest in to grow sales?
- How can your team most effectively transition from your current-state to your future-state sales org?

- **Grow your sales and sales margin** by developing and implementing a best-practice methodology for assigning customers to sales segments and channels
- **Increase customer retention and growth** by analyzing key segments and updating your GTM model to better meet your customers' needs
- **Accelerate and streamline the commercial transition** by developing recommendations on individual account assignments to individual sales staff
- **Increase your potential sales EBITDA upside** by developing a future-state workforce model to better support the future-state GTM design
- **Increase sales coverage and grow your customer base** by rigorously assessing and developing recommendations on your geographic coverage and potential new markets
- **Improve your ability to deliver on the transition** by estimating the potential program impact, articulating KPIs to track, and drafting a dashboard to track them



GTM Design & Excellence: Process Overview

Phase	Sales coverage assessment	Customer segmentation	Workforce cap. planning	Investment territories	Transition planning
Key goal	<ul style="list-style-type: none"> Increase your sales coverage & geo. efficiency 	<ul style="list-style-type: none"> Get insight into your customers and their needs 	<ul style="list-style-type: none"> Optimize your sales team for your sales needs 	<ul style="list-style-type: none"> Unlock growth from new or growing sales territories 	<ul style="list-style-type: none"> Smooth & de-risk your transition to the target-state
Key outputs	<ul style="list-style-type: none"> Clearly defined sales territories 	<ul style="list-style-type: none"> Clearly defined cust. segments GTM model for each segment 	<ul style="list-style-type: none"> Workforce design (e.g., roles, levels) 	<ul style="list-style-type: none"> Prioritized investment territories 	<ul style="list-style-type: none"> Transition plan
Key activities	<ul style="list-style-type: none"> Account-sales staff assignment model (e.g., by geo, by size, by industry, etc.) Zip-code level sales territories (creation and definition) Sales rep assignments to territories 	<ul style="list-style-type: none"> Rep. interviews Cust. interviews Customer segmentation Sales channel /group analysis Channel/group assignments to cust. segments Future-state roles & GTM channel creation Cust. assignments to segments 	<ul style="list-style-type: none"> Future-state staffing analysis Future-state staffing overview (e.g., roles, levels) Individual account assignments to sales staff Revised workforce org charting (lines and boxes) Key change analysis (e.g., staff, cost) 	<ul style="list-style-type: none"> Pot. investment territory analysis (size, competition, coverage, etc.) Pot. inv. territory prioritization Top territory business models Coverage & mkt plans for top inv. territories 	<ul style="list-style-type: none"> Key gaps analysis (current- to future-state org) Pot. sales bridge identification & analysis Interim-state org visioning Transition planning (top actions, timeline, governance plan) KPI development

