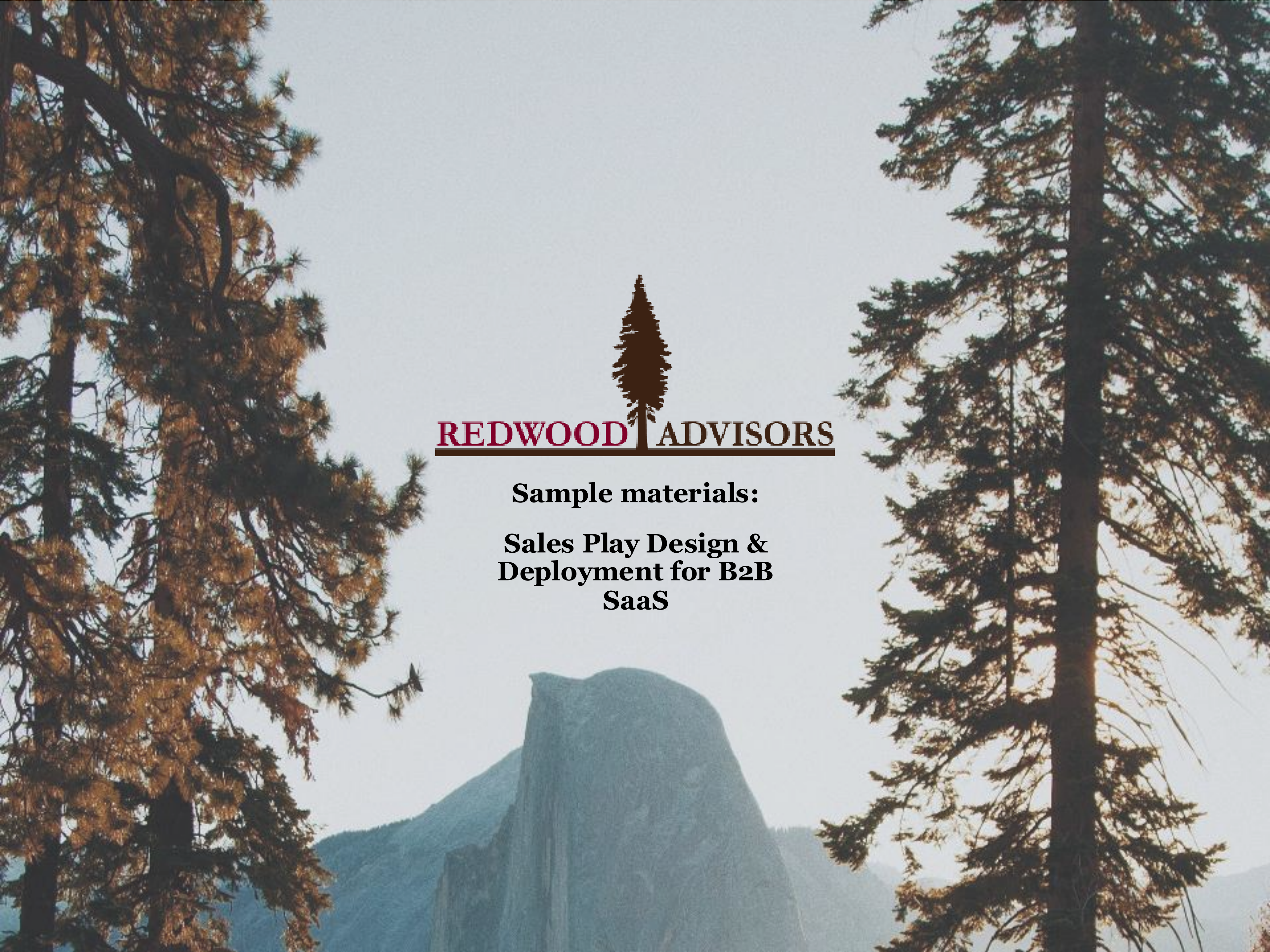

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Sample materials:

Sales Play Design & Deployment for B2B SaaS

Illustrative company

Case Study: Codexa Sales Play Design & Deployment

Context:

- Codexa is a B2B SaaS platform that provides workflow automation and analytics tools for mid-market operations teams. The company has built strong momentum through a sales-led growth approach supported by a small but agile sales organization.
- As Codexa continues to expand into new segments and increase average contract value, leadership has identified inconsistencies in how sales plays are designed, executed, and measured.
- The team is looking to establish a clear, repeatable sales play framework that aligns their teams, strengthens messaging consistency, and improves conversion rates. Codexa's goal is to design and implement this framework ahead of their upcoming fiscal year planning cycle.

Top illustrative insights:

- **A pipeline acceleration play** is projected to **shorten the average deal cycle by ~20%**, improving revenue predictability in mid-market segments
- Implementing a **high-value FinServe play could unlock ~$6-8M in additional ARR,** primarily through new accounts
- **The product adoption-focused play will increase active usage by ~30% across target segments** and drive additional upsell opportunities
- **Region-specific plays** will ensure that **messaging and value props are adequately delivered in international markets**

Note: Names and details have been changed for client confidentiality

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Sales Play Definition

Question	Answer
What is a sales play?	• Sales play is an enterprise-wide cross-functional effort to drive clear, quantifiable sales goals
Why run a sales play?	• To accelerate top- and bottom-line growth with core customer segments
How are sales plays run?	• 1-2 central teams coordinate a cross-functional effort to plan, execute, track, and manage a coordinated set of actions to go after a clearly specified sales objective

Sales plays cover a clear GTM intent (“sell <product> to <segment> via <core message>”)

Sales Play Design & Deployment: Project Overview

Phase	Phase 1: Strategic context	Phase 2: Play design & prioritization	Phase 3: Play implementation
Key outcomes	• Capture key insights and define principles & goals for the sales play program	• Identify, prioritize, and develop overviews for top potential sales plays	• Build a system (e.g., roles, processes, templates) for executing the plays
Key activities	• Conduct assessment (e.g., interviews, data review) of current state execution • Define guiding principles & high-level goals for the future-state sales play system & processes • Identify key implications from the principles and goals • Overview any current-state plays with key involved functions, roles, and responsibilities	• ID the universe of ideas for top pot. sales plays • Create a high-level assessment method to evaluate sales plays • Prioritize the top 3–4 sales plays • Develop strategic overviews for each prioritized play, including play-specific goals, rationale, and target segments	• Define functional roles and responsibilities for sales play execution • Outline key core process for designing & executing sales plays, including steps, owners, inputs / outputs, & timing • Develop key planning templates with stakeholder input • Build governance system including key meetings, agendas, & perf. metrics

Sales plays cover GTM intent ("sell <product> to <segment> via <core message>"), target segments, and supporting tactics (e.g., how to execute the play)

Agenda

Strategic Context

Future State Design

Play Implementation

Sales play effort principles

- **Customer-centered:** Ensure every play delivers clear, relevant value messaging that aligns to specific buyer personas and use cases
- **Scalable & repeatable:** Develop plays that can be consistently executed across regions, segments, and teams supported by clear templates, assets, and enablement materials to support adoption at scale
- **Cross-functional & aligned:** Foster collaboration between functions to maintain message consistency and end-to-end customer engagement
- **Data-driven:** Leverage performance analytics and CRM insights to guide play design, prioritize opportunities, and measure impact

Key principles for the future-state sales play system defined in partnership with Codexa leadership

Deep dive follows

Team developed an overview what would be included within a standard sales play and resulting implications

What is included in a sales play?

- Robust **sales play overview, clear target segments,** and **supporting tactics** (for each segment)
- A clear **go-to-market intent** ("sell <product> to <customer> via <core messages>")
- **Strategic rationale** for prioritizing the sales play(s) (e.g., addressable market size, competitive landscape, customer buying behaviors, market forces)
- Well-defined, quantifiable **goals** (i.e., objectives)

Key implications

- **Regular monthly meetings** to track progress & plan moving forward
- **Align marketing messaging & tactics** across functions (e.g., Sales, Customer Success)
- **Upgrade & enhance core content** and amplify impact with coordinated campaigns

Final overview covered 16 core elements of a sales play and 7 key implications for the team

Key sales play elements were laid out in an overall framework

Graphic was shared with stakeholders across functions for feedback

Sales play overview

Overview | Rationale

Goals & Metrics | Segmentation

Target segment (e.g., industry, function, geo, persona)

Description | Objectives | Use cases | *XX*

XX | *XX* | *XX* | *XX* | *XX*

Target segments

Supporting tactics

XX | *XX*

XX

Supporting tactics

Supporting tactics

Supporting tactics

Supporting tactics

Governance & Performance Management

Team worked with Codexa to surface key strategic questions to guide the sales play system

Key question	Hypothesis answer
How many active plays should be in motion at any given time?	• Codexa will focus on depth over volume and run 2-3 core global plays • In the future, there may be up to 2 additional segment-specific plays based on market opportunity and team capacity
How long should the sales plays run?	• Each play will run for a least two quarters with the aim of running for 3+ • Successful plays may continue being renewed YOY
How will ownership and accountability for each sales play be defined?	• Each play will have a designated cross-functional "play owner" responsible for coordinating execution, tracking performance, and ensuring alignment across Sales, Marketing, and other GTM teams
Can plays be run regionally?	• Regional or segment-specific adaptations of the core, enterprise-wide sales plays may be driven by local sales leadership

Key objectives (i.e., what we want out of these) **for the new sales play system**

	Business outcomes	**Operational goals**
Core intent:	*Drive measurable, sustainable growth by building a unified, data-informed sales play system that enhances performance*	*Enable Codexa's GTM teams with a clear, scalable framework for how plays are designed, launched, and iterated*
Key elements:	• Increase closed-won revenue and pipeline velocity • Improve ARR growth and expansion • Strengthen up-sell and cross-sell performance • Boost conversion across trials, demos, and activations • Enhance overall customer lifecycle value and retention	• Pilot and test new play formats, tactics, and channels • Establish a rhythm for play evaluation and impact reporting • Strengthen coordination between marketing, sales, and other GTM teams • Build a repeatable process to launch, measure, and optimize future plays

Agenda

Strategic Context

Future State Design

Play Implementation

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Team prioritized three key sales play ideas to move forward with

1. **Sell automated workflow offers to lagging leads**
2. **Promote decision-making with data analytics for FinServe**
3. **Drive <Product> adoption in Sales teams**

Initial sales play drafts were collected from various stakeholders interviews and prioritized with Project Sponsor

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Overview for top plays

Potential play	Rationale	Key goals	Target segments
Sell automated workflow offers to lagging leads	▪ Many mid-market ops teams spend significant time on manual, repetitive tasks. ▪ Reducing internal effort with automation resonates with customer pain points	▪ Increase ARR from Sales teams ▪ Reduce average time to close ▪ Increase total count of demo requests	▪ Leads with above-average time-to-close ▪ Mid-market operations teams in industries with repetitive processes
Promote decision-making with data analytics for FinServe	▪ Customers often lack clear visibility into operational performance ▪ Framing analytics as a tool to guide smarter decisions addresses a core pain point	▪ Increase ARR from FinServe ▪ Increase pipeline influenced by data analytics ▪ Boost total analytics-focused discovery meetings	▪ Ops leaders managing multiple teams or regions ▪ Teams with siloed or fragmented data sources
Drive <Product> adoption in Sales teams	▪ Adoption needs to be boosted to drive additional ROI and business impact of <Product> ▪ Embedding tools in workflows improves usage and outcomes	▪ Increase active usage ▪ Accelerate time-to-value ▪ Remove adoption barriers	▪ Teams or regions with low adoption ▪ New hires or transitioning teams ▪ Segments where adoption drives revenue

Team selected one play to run as a pilot for the new sales play system; deep-dive follows

Redwood worked with the team to design a pilot play to test the new system focused on two major customer pain points

Pilot play: Drive <Product> adoption in Sales teams

Pain points	Core Benefit	Value Props
Inefficient Operations • Manual workflows slow down team productivity • Hard to track progress and identify bottlenecks	**Automation**	**Streamline repetitive operational tasks** **See all team activity in one place**
Limited Insights for Decision-Making • Data is siloed and hard to analyze • Teams struggle to identify where to improve	**Visibility**	**Identify process bottlenecks quickly**

Team ran pilot play for ~3 months to help refine the future-state sales play process

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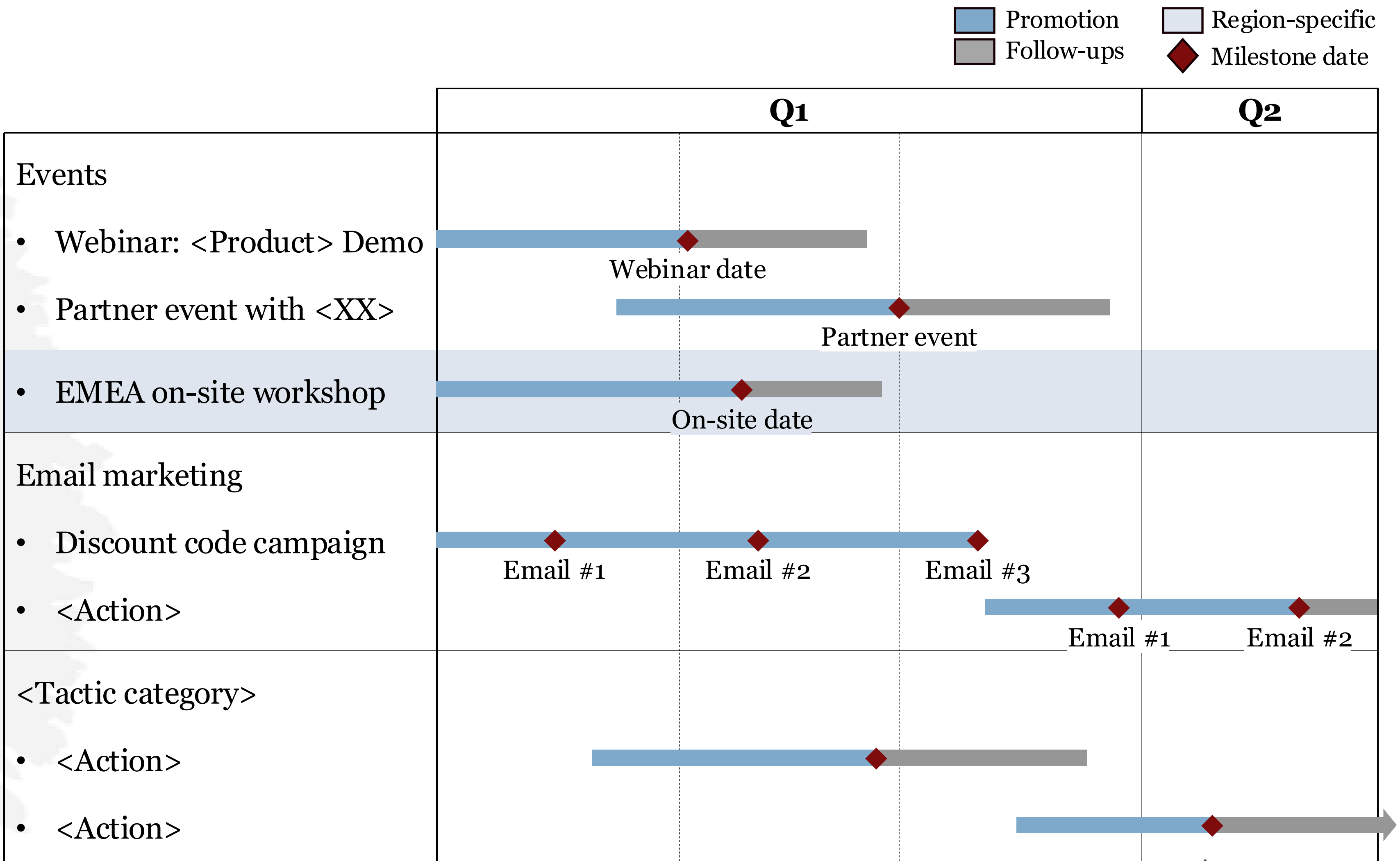
Pilot play encompassed a variety of supporting tactics led by multiple functions across the 3-month timeline



Agenda

Strategic Context

Future State Design

Play Implementation

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Key teams involved

Marketing

- Product Marketing
- Content & Social
- Performance Marketing
- Analytics

Outside Growth

- Sales
- GTM Enablement
- GTM Strategy & Operations
- Customer Success

Redwood team identified and prioritized ~12+ teams that would be involved as a driver, approver, supporter, or informed group on the sales plays

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Top responsibilities were defined for each involved function

Function	Overview	Key activities (illustrative)
1 **Product Marketing**	• Drives the strategy, messaging, and assets for sales plays, ensuring they resonate with target customers and are ready for sales execution	• Define target customer segments and sales play objectives • Develop messaging, positioning, and value props for each play • Coordinate GTM strategy, routes-to-market, and supporting tactics • Create and distribute sales play briefs and core assets to enable execution
2 **Content & Social**	• Supports sales plays by creating, curating, and distributing marketing assets that amplify play messaging and engage target audiences	• Develop and adapt content for sales play segments (blogs, videos, social posts) • Provide existing content and assets to support sales plays • Schedule and execute social campaigns aligned with sales play milestones • Track and share performance data to inform play effectiveness

Team held alignment meetings across functions to refine and finalize all responsibilities

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Team laid-out a future-state process for planning and executing sales plays

Phase 1: Play overview

1. Propose, define, and agree on new sales play(s) at a high level with key GTM leadership
2. Create detailed sales play intent, segments, and messages
3. *XX*
4. *XX*

Phase 2: Tactics planning

5. Develop function-level, executable plans to support the sales plays (e.g., workshops, webinars, whitepapers)
6. Gather bill of materials to execute on the function-level plans
7. *XX*
8. *XX*

Phase 3: Play execution

9. Launch sales play within company CRM
10. Run sales play tactics
11. *XX*
12. *XX*

Phase 4: Close-out

13. Synthesize sales play performance
14. Hold final retro on sales play with responsible owners
15. *XX*
16. *XX*

For each step, team defined owners, inputs, outputs, and outcomes

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Three key meeting types were designed to govern the sales plays

Meeting	High-level overview	Key goals	Attendees
BR meetings (biweekly)	• Update dashboard to reflect latest thinking on key goals • Review progress on key ongoing supporting tactics	▪ Update tracking dashboards ▪ Identify and address any feedback or blockers ▪ Align on key next steps for the sales play	▪ Sales play lead ▪ Sales play “responsible” owners ▪ Key “accountable” leadership optional
Sales play retros (at sales play end)	• Conduct a comprehensive retro at the close of the play’s planned scope • Uncover & assess final results, key insights, and top learnings to share with leadership	▪ Assess overall performance of the sales play ▪ Align on key insights or findings on the sales play ▪ Align on whether to continue the sales play	▪ Sales play lead ▪ Sales play “responsible” owners
Leadership sales play reviews (~1-2 weeks after retro)	• Provide a VP-level update on the performance of the play • Share final results, key insights, and top learnings • Align on whether to continue or suspend the play	▪ Share overall performance of the sales play ▪ Overview key insights & findings from the sales play ▪ Finalize go-forward posture on sales play	▪ Sales play lead ▪ Sales play “responsible” owners ▪ Key “accountable” leadership

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Meeting roles were overviewed for key participants

Key roles	Role overview
Meeting facilitator	▪ Provide high-level top of mind thoughts on progress of the sales play to-date ▪ Run the meeting agenda ▪ Capture key insights & next steps post-meeting
Presenter	▪ Compile key data & findings on assigned area(s) ▪ Provide update to the broader group on assigned area(s) ▪ Execute on assigned next steps coming out of the meeting
Participant	▪ *As helpful,* provide insights and/or feedback on how the sales play is performing ▪ *As helpful,* suggest potential improvements on the sales play

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Team developed detailed standard agendas for each meeting type to manage progress on the plays

BR

- Discuss top of mind thoughts from facilitator / sales play leader
- Review dashboard(s) overviewing sales play progress to-date
- Review timeline and next steps for upcoming tactics
- Discuss any outstanding questions or feedback
- Align on next steps and owners

Retrospective

- Discuss top of mind thoughts from facilitator / sales play leader
- Review final results of the sales play across the goals and supporting tactics
- Discuss top insights & learnings
- Align on next steps to finalize executive update for conclusion meeting

Leadership review

- Discuss high-level update from sales play leader
- *As helpful*, discuss any top of mind thoughts from key GTM leadership
- Walkthrough final results of the sales play across the key goals
- Finalize decision on whether to continue the play

Team joined initial calls to launch standard cadence and make adjustments to agendas as helpful


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