



**REDWOOD** ADVISORS

**Salesforce Design  
& Optimization**

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



## Salesforce Design & Optimization projects help optimize your sales & marketing orgs to better serve customers and grow your top & 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

### Salesforce Design & Optimization 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 best 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 assignment 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

# Salesforce Design & Optimization: Process Overview

| Phase          | Sales coverage assessment  | Customer segmentation   | Investment territories   | Workforce cap. planning  | Transition planning   |
|----------------|--|---|--|--|---|
| Key outcomes   | <ul style="list-style-type: none"> <li>Understand top strengths &amp; key gaps of current sales model</li> </ul>   | <ul style="list-style-type: none"> <li>Update segments &amp; channel mapping to fit customer needs</li> </ul>   | <ul style="list-style-type: none"> <li>Unlock growth from new or growing sales territories</li> </ul>  | <ul style="list-style-type: none"> <li>Optimize your sales team for your sales needs</li> </ul>  | <ul style="list-style-type: none"> <li>Smooth &amp; de-risk your transition to the target-state</li> </ul>  |
| Key activities | <ul style="list-style-type: none"> <li>Overview the current-state GTM model (e.g., cust. segmentation, sales channels)</li> <li>Create a comprehensive, vetted map of the current org (i.e., lines and boxes)</li> <li>Analyze historic sales data for insights by geo, sales rep, product category, etc.</li> </ul> | <ul style="list-style-type: none"> <li>Interview sales reps &amp; customers</li> <li>Define clear, thoughtful cust. segments</li> <li>Identify target sales channel / groups by segment</li> <li>Identify key future-state roles &amp; GTM channels</li> <li>Assign customers to new, refined segments</li> </ul> | <ul style="list-style-type: none"> <li>Prioritize pot. investment territories based on opportunity size, competitors, coverage, etc.</li> <li>Develop business cases for the top territories to est. EBITDA impact</li> <li>Create coverage &amp; market plans for top investment territories</li> </ul> | <ul style="list-style-type: none"> <li>Identify and define key future-state roles and staffing levels</li> <li>Develop rec. on individual account assignments to sales staff</li> <li>Lay-out revised sales workforce in an org chart</li> <li>Synthesize the key changes (e.g., staff, cost)</li> </ul> | <ul style="list-style-type: none"> <li>Identify key gaps to future-state org</li> <li>Identify key sales gaps to bridge</li> <li>Develop a pot. interim-state org structure</li> <li>Create a transition timeline &amp; identify top actions</li> <li>Create a standing gov. model and metrics to track the transition</li> </ul> |