



REDWOOD ADVISORS

Value-Add Services Design & Deployment

*Identify and prioritize top
opportunities to implement new
value-add services offerings*

Value-add Services Diagnostic & Design: Project Overview

Phase	Phase 1: Strategic Context	Phase 2: Identification & Prioritization	Phase 3: Design & Deployment
Key outcomes	Synthesize current services, customer needs, and internal capabilities	Prioritize services that align with customer needs & internal capabilities	Develop plans to pilot and scale high-priority value-add services
Key activities	- Synthesize current service portfolio and goals - Collect and analyze internal data & materials (e.g., usage, pricing, cust. satisfaction, financials) - Synthesize customer and sales feedback on unmet needs or potential service enhancements - Overview capabilities and resources available to support value-add services - Synthesize findings into a current-state diagnostic highlighting strengths, gaps, & opportunity areas	- Develop a framework for organizing all potential value-add services - Lay-out comprehensive universe of potential value-add services - Size each potential value-add service - Assess potential value-add services by fit and ease of execution - Prioritize 3–5 high-potential value-add services using value potential & ability to execute	- For each top service, develop a strategic overview (e.g., value prop, target customers, delivery model, pricing approach) - Develop a deployment roadmap outlining key milestones, timelines, resource requirements, and dependencies - Set owners for the key milestones in the roadmap - Create a lightweight business case and success metrics for each service (e.g., margin impact, adoption targets)

Projects can increase **customer lifetime value** by ~15-30% and **improve retention** by ~5-10%