



**Use Case Transformation
Sample Materials**

B2B SaaS companies often focus marketing on two key areas: core product capabilities and/or customer use cases

 Recommended solution

Mktg. focus	Product capabilities	Customer use cases
Overview	Focuses on product features, functionality, and technical capabilities	Focuses on core use cases of our solutions that address customer challenges and drive growth
Pros	• Clearly communicates product strengths and differentiators • Easier to maintain and align messaging with product releases • Effective for technical evaluators and product comparisons	• Connects directly to customer priorities and pain points • Makes value easier to understand and communicate internally • Creates more relevant messaging across industries, personas, and funnel stages
Cons	• Requires buyers to translate features into business value themselves • May be less effective for selling at decision maker level (vs. user level) • Can feel generic when competitors offer similar functionality	• Requires stronger governance and ongoing alignment • Can be harder to standardize without a common framework • Demands strong customer and market understanding from internal team members

Redwood Advisors helps GTM teams utilize use case-focused marketing to meet customers where they are and “speak their language” to effectively sell

Use Case Transformation: Process Overview

Phase	Phase 1: Current-State Assessment	Phase 2: Framework Design	Phase 3: Governance & Operationalization
Key outcomes	Overview existing use case assets and objectives to develop a vision for the future use case system	Build an enterprise-wide framework for developing, organizing, and activating use cases	Design the processes and governance needed to sustain and scale the use case system over time
Key activities	- Synthesize use case frameworks and assets - Assess and summarize how use cases are currently incorporated in marketing & sales - Define guiding principles to align on vision & goals of the use case transformation - Assess how existing use cases map across customer segments, industries, and business priorities - Identify gaps and redundancies in the current use case landscape - Lay out key implications to inform future-state design	- Develop use cases dimension framework (e.g., department, industry, business objective) - Develop a system to define core, broadly applicable use cases vs. specialized use cases - Set validation criteria for new use cases - Design standardized bill-of-materials (BOM) templates laying out assets required for each use case tier - Design a centralized use case library structure	- Define key function's responsibilities across use case creation and maintenance - Design process to introduce, prioritize, update, and retire use cases - Establish governance model (e.g., meetings, timing, decision rights) and performance review processes - Develop enablement plan to drive use case adoption - Deliver a phased roadmap for ongoing use case management, refinement, and expansion

Key terms for the framework are clearly defined to help build cross-functional understanding

Term	Definition	Key details	Real-world example
Job to be done ¹	The underlying motivation or progress someone wants to complete in a specific domain or area	- Focuses on <i>why</i> someone is undertaking action - Illustrates “success”	Help me improve my overall health in a way that fits my daily routine
Use case	How someone uses a system, product, or service to achieve a specific goal	- Should be a real-world situation - Considers actor, goal, steps, and outcome	Use a meal planner to track and manage what foods I eat each day
Use case category	The most common types of business processes referred to or understood by people operating in a given area (e.g., business department, industry)	- Encompasses multiple use cases - Potentially some overlap with capabilities	Healthy eating

Many teams have different understandings of what counts as a “use case,” making definition outlines critical to build alignment

Guiding principles are set to align leadership on a shared vision for how the use case system should work

1

Focus on the highest-impact opportunities: Prioritize use cases that support strategic growth objectives, key customer segments, and critical revenue motions

2

Establish a shared operating framework: Create a common use case structure, taxonomy, and governance model that enables consistency and improves cross-functional alignment

3

Balance standardization with flexibility: Maintain a centralized foundation of use cases while allowing teams to tailor content and execution for specific audiences, markets, and needs

4

Embed use cases across the customer journey: Use customer-centric use cases as a core input to messaging, campaigns, sales motions, enablement, and customer engagement

Guiding principles are shared across teams and functions as a part of the use case transformation

Team defines types of dimensions that might be used within the use case framework

Dimension type

Overview

Example

Customer segmentation
(i.e., audience)

- Facts or defining features of the target customer that could impact what use cases are relevant to them

- Industry the customer plays in

Technical segmentation
(i.e., what, why, how)

- Key details about how the capabilities and jobs to be done required for the use cases

- Business-to-business (B2B) vs. business-to-customer (B2C)

These dimension types are reviewed and defined with key leadership

Potential dimensions for the use case framework are defined and prioritized

 Core dimensions
 Secondary dimensions

Illustrative sample

Customer segmentation (i.e., audience)		Technical segmentation (i.e., what, why, how)	
Business department	Segment where the business process takes place (e.g., HR)	Use case category	High-level business process or pain point use cases address
Industry	Description of industry the cust. plays in	Capability area	High-level activities the product / solution set enables the customer to do
Customer size	What size segment the customer falls under	Job to be done	Why the use case is occurring (i.e., motivation for the use case)
Geography	Location of the customer (i.e., U.S., Mexico, UK, Australia)	B2C vs. B2B	Business-to-customer or business-to-business

Dimensions are reviewed and refined with team members across all key functions (e.g., Product Marketing, Lifecycle Marketing, Sales, Customer Success, Product)

Core dimensions are further defined in deep-dives

Key lines of business (i.e., business department)



Sales



**Customer
Experience**



**Human
Resources**



IT



Marketing



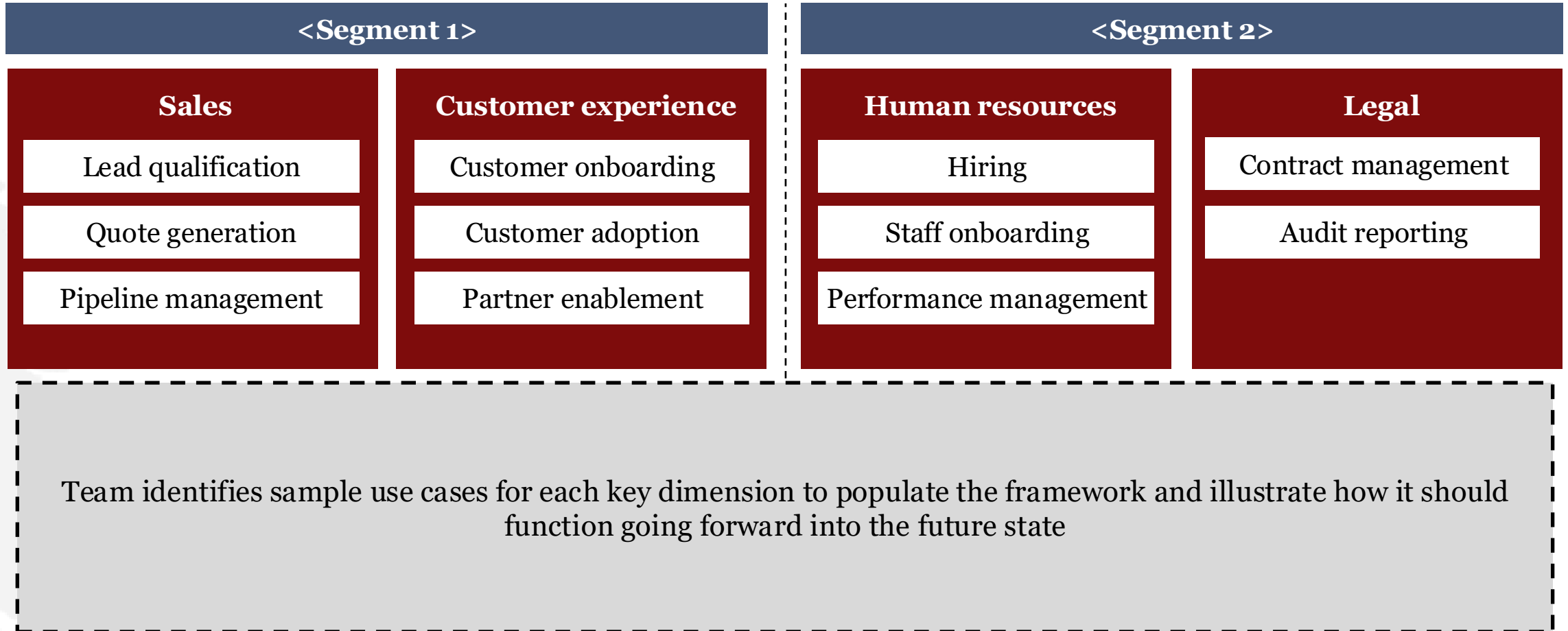
Procurement



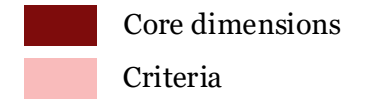
**Risk
Management**

Top dimensions are reviewed, refined, and finalized across conversations with multiple stakeholders based on (1) comprehensive, industry-standard ontologies and (2) company strategic priorities & focuses

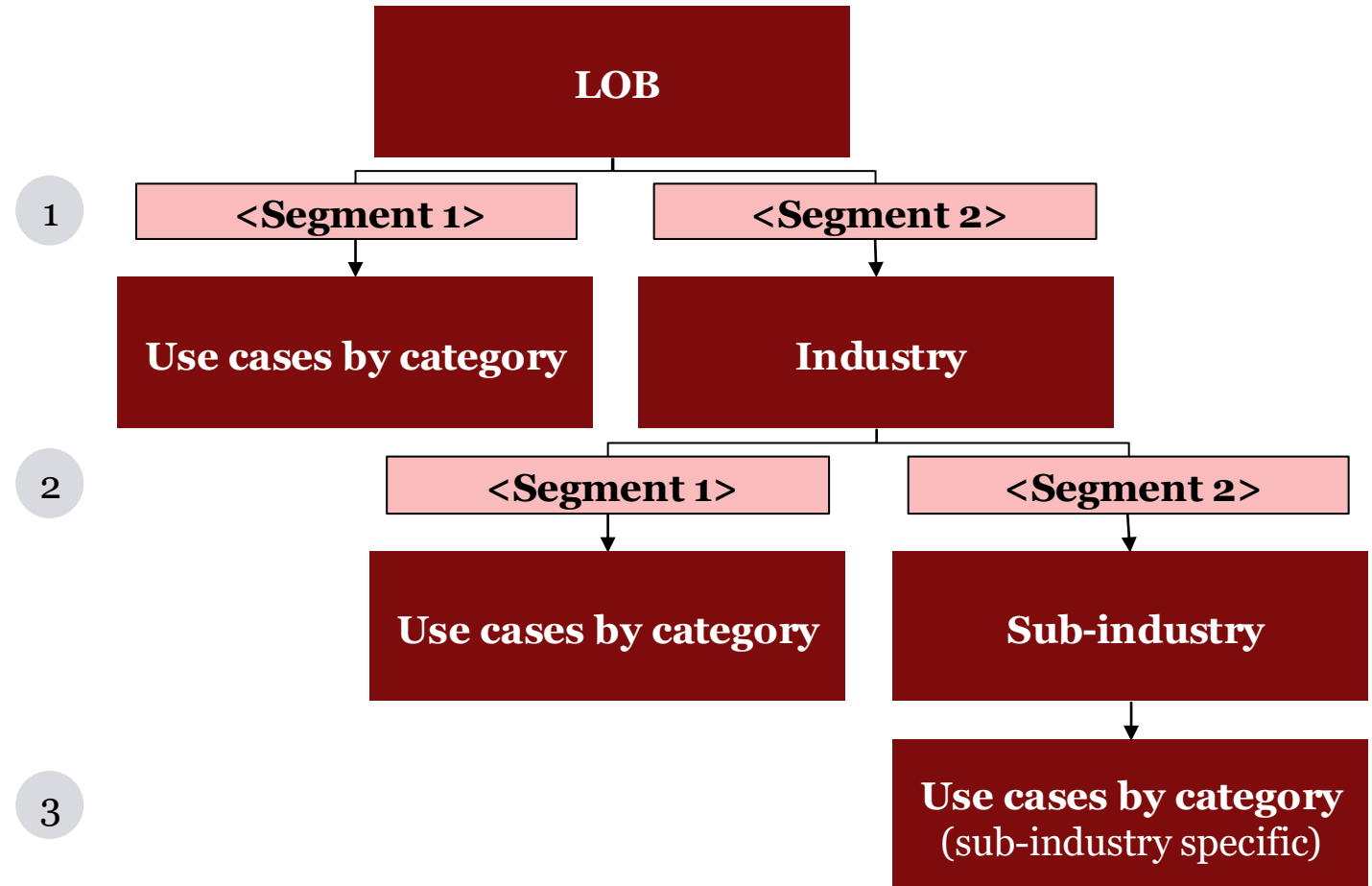
Team highlights key use cases that fall into the core dimensions



Tops-down flow of the framework



Team drafts step-by-step instructions for how the framework should flow so the full organization has clear and crisp guidance



Bill of materials assets overview

 Internal asset
 External asset

Asset	Overview	Illustrative use of asset
Script repository	• Repository of content and scripts for customer-facing team members to reference for customer conversations	• Sales references message house to get an explicit talk track ahead of a conversation with a customer
Internal guide	• Core source of truth for use case categories including target customers, pain points, etc.	• Marketing uses guide to develop email campaigns highlighting the use cases
Demo	• Step-by-step demo of how <the solution> addresses a specific use case category for a customer in a given LOB or industry	• Sales rep shares a guided demo for how an HR team member could use <the solution> in their hiring process
Pitch deck	• Overview deck that pitches <the solution> for a particular LOB or industry (including roadmap slides for use case categories)	• Rep shares pitch deck with customer to illustrate what a feature can do to address a business processes

Most bills of materials covers all assets to be developed for use cases including Sales Enablement materials and core customer-facing marketing materials

Responsibilities breakdown: Function level

Responsibility area	Industry agnostic departments		Core		Priority 2		Priority 3	
	Responsible	Support / Consult	Responsible	Support / Consult	Responsible	Support / Consult	Responsible	Support / Consult
Industry definition	—	—	Product Marketing	Lifecycle Marketing	Product Marketing	Lifecycle Marketing	Product Marketing	Lifecycle Marketing
Sub-industry def.	—	—	Product Marketing	Lifecycle Marketing	Lifecycle Marketing	Product Marketing	—	—

Team identifies the most crucial 5-7 responsibility areas for finalizing and governing the use case framework and their functional owners (e.g., responsible, supporting)

Team outlines core responsibilities for each key function involved with deploying the use case framework



Team develops deep-dive list of key responsibilities

Function:	Product Marketing	Sales Enablement
<i>Responsibilities:</i>	• Develop key BOM assets for core use cases • Run governance meetings to keep the use case system in place and updated • Capture feedback from other functions on the use case system & BOMs; track and coordinate next steps to address the feedback as relevant • As needed, make refinements to the use case framework (e.g., core dimensions, categories)	• Collect customer data on what use cases are most prevalent from existing customer base • Develop enablement playbooks utilizing content from the core use system • Drive adoption among Sales team members • As helpful, distill down and share top feedback from Sales on use cases (e.g., effective messages, segment differences)

Responsibilities are defined for all key functions that contribute to, manage, or utilize the use cases as a part of their core work

Governance overview covering all key meetings

Meeting	High-level overview	Key goals	Attendees
Working group session (Biweekly, ~45 minutes)	Discuss proposed additions & changes to the use cases; align on go-forward next steps across the proposed changes	• Discuss key strategic changes • Walkthrough potential retirements and changes to the current use cases • Discuss pros and cons of all proposed changes • Align on next steps	• Use Case system lead • Key Marketing lead • POCs from supporting functions
Feedback review (Monthly, ~30 minutes)	Review key sources of feedback on the use case system, capture insights, and align on next steps	• <i>As helpful</i>, discuss strategic changes • Review and discuss key customer pain points • Review and discuss key perf. metrics • Capture key issues and opportunities and align on next steps	• Use Case system lead • Use Case owners • DRIs from use case user functions (Optional)

Can we be helpful to you?

If we can be helpful, please reach out to John Nantz at:

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