



# Technology Practice Briefing

<https://www.alexandergroup.com/industries/technology/overview/>

Chris Semain, Principal  
csemain@alexandergroup.com

Jake Johnson, Principal  
jjohnson@alexandergroup.com

# DECK CONTENTS



**Alexander Group Technology Practice Overview**



**Alexander Group Project Types & Case Studies**



**Alexander Group Point-of-View**



**Technology Industry Trends**

**Alexander**<sup>TM</sup>  
Group



# Alexander Group Technology Practice Overview

# Alexander Group Overview

## CLIENT SERVICES



### MANAGEMENT CONSULTING

Marketing • Sales • Service



### RESEARCH

Benchmarks • Trends • Insights



### COMMUNITY

Learn • Share • Network

## KEY INDUSTRIES



Business Services



Distribution



Healthcare



Life Sciences Tools & Services



Manufacturing



Media & Consumer Technology



Technology



Private Equity

**40+** years of revenue growth experience

**3000+** clients across industries (incl. 50%+ of global 2000)

**6500+** research and community participants every year



# Accelerate Profitable Organic Revenue Growth

## CLIENT ISSUES

### GROWTH

- New market entry
- Integration
- New logo acquisition
- Cross-sell and upsell
- Retention
- Productivity

### EXECUTION

- Demand generation
- Channel selection
- Job and org design
- Resource deployment
- Talent
- Performance management
- Sales compensation
- Revenue operations
- Pricing



## EXPECTED RESULTS



### IDENTIFY

Capture opportunity by uncovering new insights into growth potential



### TARGET

Reach the right buyers with the right messages based on unique needs



### ALIGN

Structure and deploy resources for optimal productivity and ROI



### ENABLE

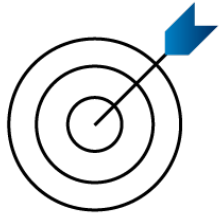
Manage, train, and motivate talent via strategic management programs

Go To Market Focus

Practice Area Expertise

Emphasis on Outcomes

# Alexander Group Capabilities & Solutions



GO TO MARKET



STRATEGY



STRUCTURE



MANAGEMENT

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## ILLUSTRATIVE/SAMPLE PROJECT TYPES



### Holistic

- Transformation
- Integration
- Value Creation Plan
- Diagnostic and Blueprint



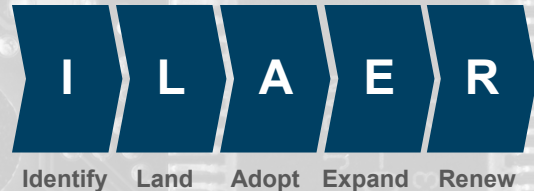
### Focused

- Ideal Customer Profiles, Segmentation, Opportunity Modeling, Targeting
- Marketing Performance
- Coverage, Job Architecture, Talent
- Deployment, Goals, Sales Compensation, Revenue Operations

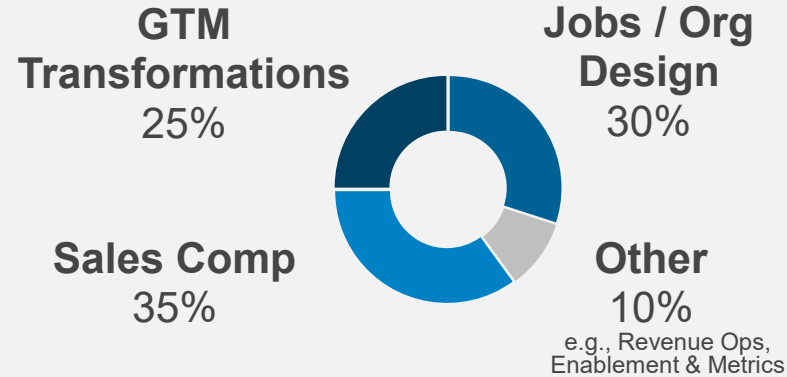
# Alexander Group Technology Practice Overview

## OVERVIEW

**TECHNOLOGY  
INDUSTRY  
REVENUE GROWTH  
MANAGEMENT  
CONSULTING FIRM**



## ENGAGEMENT TYPES



## EXPERIENCE

- › \$50M to \$100B+ Revenue
- › Direct and Indirect
- › Hardware, Software & Services
- › On-Premise and Cloud
- › One-Time, Subscription & Consumption Pricing

## ENGAGEMENTS










**150+**  
Projects a Year

## RELEVANT BENCHMARKS

**300+** Datasets  
**150+** Metrics

*“Alexander Group has the most relevant high tech sales productivity, investment, COS, deployment and sales compensation benchmarks in the industry.” - CRO*

# Alexander Group – Revenue Growth Model™

STRATEGY	STRUCTURE	MANAGEMENT
<p>1</p>  <p>Revenue Segments</p> <p>What are our best revenue opportunities—defined by customers, products and channels?</p> <p>Do we know revenue segment potential?</p> <p>How much revenue can we capture?</p>	<p>4</p>  <p>Channel Coverage</p> <p>Are we employing the optimal use of direct, inside and channel routes to market?</p> <p>Are sales investments focused on the right customers?</p>	<p>7</p>  <p>Talent, Skills &amp; Supervision</p> <p>Do we effectively attract and recruit talent?</p> <p>Do our sales onboarding and training programs successfully ramp new hires?</p> <p>Are our managers equipped to coach?</p> <p>Do we manage out poor performers?</p>
<p>2</p>  <p>Value Propositions</p> <p>Do our messages differentiate us and define the benefit to our customers within each revenue segment?</p> <p>Are our selling messages packaged and supported in a way that our salesforce can effectively deliver them?</p>	<p>5</p>  <p>Organization &amp; Job Design</p> <p>Do we have the right sales roles?</p> <p>Is each role clearly defined based on product, process and customer focus?</p> <p>Is our sales management structure aligned to our needs?</p>	<p>8</p>  <p>Productivity, Quotas &amp; Metrics</p> <p>Do we track the right metrics to manage sales productivity?</p> <p>Do we have an effective quota system?</p> <p>Do we have accurate and impactful reporting?</p>
<p>3</p>  <p>Revenue Motions</p> <p>Are we executing the right selling activities for each segment?</p> <p>Is Marketing maximizing sales effectiveness and revenue growth?</p> <p>Is Service leveraged to the fullest extent?</p>	<p>6</p>  <p>Sizing &amp; Deployment</p> <p>Do we have the right sales force size?</p> <p>Are deployment ratios for pre-sales, post-sales and specialists appropriate?</p> <p>Is manager span of control correct?</p> <p>Are territories well-defined and balanced?</p>	<p>9</p>  <p>Compensation &amp; Rewards</p> <p>Do we measure and hold accountable the right selling behaviors?</p> <p>Do we have aligned and effective rewards and sales compensation programs?</p>



# Select AGI Clients & Research Participants



## Application & Services

(Mostly Pureplay XaaS)

- ▶ 6sense
- ▶ Adobe
- ▶ Airtable
- ▶ Anaplan
- ▶ Autodesk
- ▶ Box
- ▶ Certinia
- ▶ Cornerstone
- ▶ Deltek
- ▶ Dropbox
- ▶ Education Perfect
- ▶ Experity
- ▶ FICO
- ▶ Figma
- ▶ Five9
- ▶ Highspot
- ▶ Hubspot
- ▶ Intuit
- ▶ Ironclad
- ▶ LegalZoom
- ▶ Microsoft Dynamics
- ▶ Nuance
- ▶ Outreach
- ▶ Pendo.io
- ▶ Persado
- ▶ PTC
- ▶ Salesforce
- ▶ SAP
- ▶ ServiceNow
- ▶ Sprinklr
- ▶ WorkBoard
- ▶ Workday
- ▶ Zendesk
- ▶ Zoom

## Infrastructure & Platform XaaS

- ▶ AppDynamics
- ▶ Amazon
- ▶ Barracuda Networks
- ▶ Boomi
- ▶ Cloudera
- ▶ Cockroach Labs
- ▶ Confluent
- ▶ Darktrace
- ▶ Databricks
- ▶ Datadog
- ▶ Druva
- ▶ Equinix
- ▶ ExtraHop
- ▶ ForgeRock
- ▶ GitLab
- ▶ Grafana Labs
- ▶ HashiCorp
- ▶ Imperva
- ▶ LogicMonitor
- ▶ McAfee
- ▶ Microsoft
- ▶ Qubole
- ▶ Rapid7
- ▶ Samsara
- ▶ Segment
- ▶ SentinelOne
- ▶ Snowflake
- ▶ Sophos
- ▶ Sumo Logic
- ▶ ThoughtSpot
- ▶ Twilio
- ▶ UserZoom
- ▶ Zix

## Infrastructure & Platform Hybrid XaaS & Perpetual

- ▶ ADT
- ▶ Aryaka
- ▶ Atlassian
- ▶ BMC
- ▶ Broadcom (VMware)
- ▶ Commvault
- ▶ CyberArk Software
- ▶ Elastic
- ▶ ExtraHop
- ▶ F5
- ▶ GE Digital
- ▶ Genesys
- ▶ Informatica
- ▶ Jitterbit
- ▶ Nintex
- ▶ Nutanix
- ▶ Palo Alto Networks
- ▶ Pega Systems
- ▶ PTC
- ▶ Qlik
- ▶ Quest Software
- ▶ Relativity
- ▶ Riverbed
- ▶ Siemens
- ▶ Splunk
- ▶ Syniti
- ▶ TIBCO
- ▶ Tufin
- ▶ Varonis
- ▶ VERITAS
- ▶ Wind River
- ▶ Zscaler

## Hardware Solutions

(Hardware, Software and Services)

- ▶ Avaya
- ▶ Barracuda Networks
- ▶ Cisco Systems
- ▶ Dell
- ▶ Hewlett Packard Enterprise
- ▶ HPI
- ▶ IBM
- ▶ Juniper
- ▶ Keysight Technologies
- ▶ Lenovo
- ▶ NetApp

## Semiconductor

- ▶ AMD
- ▶ Fujitsu Semiconductor
- ▶ Intel
- ▶ Nvidia
- ▶ NXP / Philips
- ▶ ST Microelectronics
- ▶ Western Digital
- ▶ Xilinx

# AGI's Benchmarking Database – Key Metrics

## INVESTMENT, GROWTH & MARGIN

- Overall Revenue Growth Rate
- ACV Bookings Growth Rate
- XaaS Bookings / Total Bookings
- Sales & Marketing Expense / Revenue
- Customer Lifetime Value / Customer Acquisition Cost
- Net Revenue Retention Rate
- Growth ACV Bookings per Seller
- Sales Expense per Seller

## NEW REVENUE ACQUISITION

- Sales & Marketing Expense / Revenue
- Marketing Expense / Revenue
- Sellers per Lead Generation Ratio
- Sellers per Sales Engineer Ratio
- Digital Tools Investment / Total S&M Expense
- XaaS Customer Growth Rate
- CAC Payback Period

## OTHER COVERAGE & COMPENSATION

- Sellers at/above Quota %
- Seller Turnover %
- New Seller Ramp Time
- Engaged Selling Time
- Prospecting Time
- Customer Support Time
- Sellers & Overlays / 1st Line Mgr
- Sellers per Overlay Specialist

## INSTALLED BASE RETENTION & GROWTH

- % XaaS bookings from Cross & Upsell
- XaaS Revenue & Logo Churn Rates
- Post-Land Headcount Investment / Total Headcount Expense
- Post-Land Headcount Investment / Installed-Base ACV Bookings
- Sellers & Accounts per CSM

- Sellers per Channel Manager
- Compensation Cost / Revenue
- Total Pay and Mix for Sellers, Management, Overlays, Lead Gen and Customer Success

*Benchmarks are subject to data availability. AGI requires sufficient n-count to report any benchmark metrics.*



# Alexander Group Project Types and Case Studies

# AGI's Tech Engagements Support GTM Initiatives Driven By Market Trends and Internal Imperatives

## TYPICAL AGI ENGAGEMENTS BY GO-TO-CUSTOMER INITIATIVES

Go-to-Customer Transformations	Annual Planning Updates	Opportunistic Go-to-Customer Improvements	Benchmarking & Research
<ul style="list-style-type: none"><li><input type="checkbox"/> Growth Phase Transformation</li><li><input type="checkbox"/> Business/Pricing Model Transformation</li><li><input type="checkbox"/> Route-to-Market Transformation</li><li><input type="checkbox"/> Revenue Operations Transformation</li><li><input type="checkbox"/> Digital Transformation</li></ul>	<ul style="list-style-type: none"><li><input type="checkbox"/> Coverage and Deployment</li><li><input type="checkbox"/> Territories and Quotas</li><li><input type="checkbox"/> Compensation, Rewards and Quotas</li><li><input type="checkbox"/> Channel Program &amp; Incentives</li></ul>	<ul style="list-style-type: none"><li><input type="checkbox"/> Segmentation and Targeting</li><li><input type="checkbox"/> Job Architecture</li><li><input type="checkbox"/> Competency Models</li><li><input type="checkbox"/> Productivity Improvements</li><li><input type="checkbox"/> Customer Journey Optimization (Lead Generation, Sales, Customer Success)</li><li><input type="checkbox"/> Revenue Operations</li></ul>	<ul style="list-style-type: none"><li><input type="checkbox"/> Revenue Growth Benchmarking (ACV/Head, COS, Ratios, etc.)</li><li><input type="checkbox"/> Sales Compensation Benchmarking</li><li><input type="checkbox"/> Sales Productivity/Time Benchmarking</li><li><input type="checkbox"/> Custom Studies</li></ul>

# AGI Case Studies

Engagement Types	Typical AGI Engagements	AGI Case Study Link
<b>Go-to-Customer Transformations</b>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Growth Phase Transformation</li> <li><input type="checkbox"/> Business / Pricing Model Transformation</li> <li><input type="checkbox"/> Route-to-Market Transformation</li> <li><input type="checkbox"/> Revenue Operations Transformation</li> <li><input type="checkbox"/> Digital Transformation</li> </ul>	<ul style="list-style-type: none"> <li>• <a href="#"><u>Go-to-Customer Strategy Redesign</u></a></li> <li>• <a href="#"><u>Single Point-of-Reference for Sales Excellence</u></a></li> <li>• <a href="#"><u>Global Sales Assessment and Roadmap</u></a></li> </ul>
<b>Annual Planning Updates</b>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Coverage and Deployment</li> <li><input type="checkbox"/> Territories and Quotas</li> <li><input type="checkbox"/> Compensation, Rewards and Quotas</li> <li><input type="checkbox"/> Channel Program &amp; Incentives</li> </ul>	<ul style="list-style-type: none"> <li>• <a href="#"><u>Market Competitiveness Through Sales Compensation Assessment and Design</u></a></li> <li>• <a href="#"><u>Global Compensation Design Framework to Drive Consistency</u></a></li> <li>• <a href="#"><u>Opportunity Segmentation and Sales Compensation for Tech Company</u></a></li> <li>• <a href="#"><u>Sales Compensation Plan Evolves to Match Strategic Shift</u></a></li> </ul>
<b>Opportunistic Go-to-Customer Improvements</b>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Segmentation and Targeting</li> <li><input type="checkbox"/> Job Architecture &amp; Competency Models</li> <li><input type="checkbox"/> Productivity Improvements</li> <li><input type="checkbox"/> Sales / Lead Process Optimization</li> <li><input type="checkbox"/> Revenue Operations</li> </ul>	<ul style="list-style-type: none"> <li>• <a href="#"><u>Sales Process and Job Role Definition</u></a></li> <li>• <a href="#"><u>Collaborative Engagement With Top Sellers Supports Sustained Adoption</u></a></li> <li>• <a href="#"><u>Opportunity Segmentation and Sales Compensation for Tech Company</u></a></li> </ul>
<b>Benchmarking &amp; Research</b>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Revenue Growth Benchmarking</li> <li><input type="checkbox"/> Sales Compensation Benchmarking</li> <li><input type="checkbox"/> Sales Productivity / Time Benchmarking</li> <li><input type="checkbox"/> Sales Funnel Benchmarking</li> <li><input type="checkbox"/> Custom Studies</li> </ul>	<ul style="list-style-type: none"> <li>• <a href="#"><u>Benchmarking Guides Migration to Subscription-Based License Model</u></a></li> <li>• <a href="#"><u>Benchmarking Drives Coverage Alignment &amp; Creates Selling Opportunities</u></a></li> <li>• <a href="#"><u>A Software Company Looks at Benchmarks to Understand Reasons Behind Rep Turnover</u></a></li> <li>• <a href="#"><u>Benchmarking Analysis Uncovers Revenue Uplift Opportunities for Software Company</u></a></li> </ul>



# GTM Approach: Three Phased Approach

- AGI's collaborative three-phase approach is designed to drive stakeholder engagement and buy-in throughout the design process.

1

## GTM DIAGNOSTIC & BLUEPRINT

Assess the current go-to-market model based on how well it aligns to company strategy, market practices, and best-in-class principles. Develop a future state blueprint with prioritized design initiatives.

### 1. Diagnostic:

- ✓ Strategy, segmentation, coverage, rules of engagement and job confirmation
- ✓ Fact-based assessment with qualitative and quantitative inputs

### 2. Blueprint:

- ✓ Initial design recommendations
- ✓ Customer segment & offering / bundle alignment
- ✓ Prioritized initiatives to achieve optimal future state model
- ✓ Financial business case for change

2

## GTM DETAILED DESIGN

Lead team(s) through a process to design initiatives outlined in the Phase 1 Blueprint. Build supporting details that allow a smooth execution of optimal future state model.

### 1. Go-to-Market Design:

- ✓ Go-to-Market organization aligned to corporate objectives, commercial strategy, and best practices
- ✓ Consensus and executive buy-in critical to success
- ✓ Full detail needed to execute large-scale change such as Opportunity Model, Segmentation, Coverage & Role Optimization, Headcount Sizing & Deployment, Rules of Engagement.

3

## GTM IMPLEMENTATION

Enable a successful rollout through implementation planning, communication strategy development, and change adoption resources to successfully transition to new model.

### 1. Program Launch & Communication

- ✓ Effective change management protocols to ensure smooth transition
- ✓ Cascading communication plan that includes all relevant stakeholders

### 2. Program Execution & Enablement

- ✓ Ongoing project management
- ✓ Post-launch adoption metrics development and monitoring
- ✓ Recruiting / turnover monitoring

# Example Project Approach: Phase 1

## Activities/Analysis

## Deliverables/Meetings

- **Interviews (15-20)**
  - Executive Interviews
  - Internal Leadership & Stakeholder Interviews
- **Revenue & Account Analysis**
  - Organic Growth Analysis (OGA)
  - Account Concentration Analysis
  - Rep Productivity Analysis
- **Marketing Review & Analysis**
  - Marketing Channels Analysis
  - Funnel Fallout Analysis
  - Marketing Metrics Analysis
- **Benchmarking**
  - Revenue Growth Benchmarking
- **GTM Model Review & Analysis**
  - Strategy
    - Segmentation Model and Targeting Review
    - Value Proposition Analysis
    - Lead Gen and Sales Process Review
  - Structure
    - Sales and Marketing Channel Coverage and Investment
    - Sales and Marketing Jobs & Coverage Analysis
    - Sizing Analysis & Methodology Review
  - Management
    - Quota Methodology Review
    - Sales Comp Program Review

- **Current State Confirmation**
  - ✓ P&L Confirmation
  - ✓ Strategy & Growth Goals Confirmation
  - ✓ Current State Job & Org Structure Confirmation
  - ✓ Current State Coverage Map Confirmation
- **Diagnostic Readout**
  - ✓ Executive Summary of Interviews
  - ✓ Revenue & Account Analysis Results
  - ✓ Benchmarking Results
  - ✓ GTM Model Findings & Recommendations
- **GTM Blueprint Readout**
  - ✓ Prioritized Initiatives
  - ✓ Initial Design Recommendations
    - Future State Segmentation Model Methodology
    - Lead Gen and Sales Process Recommendations
    - Marketing Channels Recommendations
    - Future State Sales and Marketing Coverage Map
    - Future State Sales and Marketing Job Summary
    - Directional Headcount by Role
  - ✓ Detailed Design Roadmap
  - ✓ Financial business case for Change

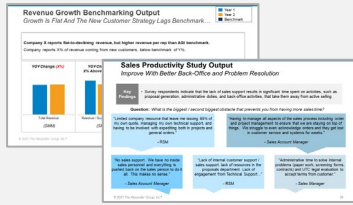
# Example GTM Phase 1 Inputs

Input	Description	Details
<b>Executive Management, Field, and Customer Interviews</b>	<ul style="list-style-type: none"><li>• Confirm growth strategy</li><li>• Gain insights on go-to-customer model and revenue motions</li><li>• Identify behaviors and activities that drive growth</li></ul>	25-30 internal 10-15 customer and prospect
<b>Revenue Growth Benchmarking™</b>	<ul style="list-style-type: none"><li>• Calculate and benchmark cost of sales and productivity</li><li>• Understand key factors that drive sales costs (e.g., target pay, compensation plans, support levels, headcount ratios)</li></ul>	Deeper dive into P&L costs, headcount, and revenue
<b>Organic Growth Analysis</b>	<ul style="list-style-type: none"><li>• Analyze year-over-year trends, customer retention, conversion, and growth to support hypotheses and qualitative findings</li></ul>	Individual account performance data, understand historic revenue growth
<b>Online Time and Productivity Study</b>	<ul style="list-style-type: none"><li>• Baseline current time profiles and productivity levels</li><li>• Fully scope roles and quantify workload</li><li>• Identify inhibitors to productivity</li></ul>	Understand resource deployment against revenue motions
<b>Pay and Performance Analysis</b>	<ul style="list-style-type: none"><li>• Analyze team and sales rep performance against quotas</li><li>• Assess strength of pay versus performance program</li></ul>	Historical seller-level pay and performance
<b>Data Analysis</b>	<ul style="list-style-type: none"><li>• Financial drill down analysis – understand performance by region, segment, sales population, and other available cuts</li></ul>	Comprehensive analysis of commercial organization performance
<b>Business Process/ Enablement</b>	<ul style="list-style-type: none"><li>• Review existing training and methodologies</li><li>• Understand existing business processes, cadence, and inhibitors</li><li>• Understand current segmentation and value proposition constructs</li></ul>	Evaluate training curriculum and materials; selling materials and playbooks

# Example GTM Key Phase 1 Deliverables

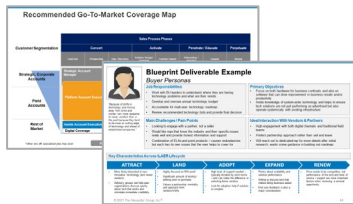
## Deliverable

## Description



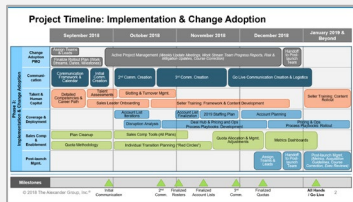
### Commercial Diagnostic

- Readout of AGI’s findings and analyses; effectiveness across end-to-end GTM strategy, structure, and management, with particular emphasis on sales compensation
- Summary of diagnostic results, including interview findings, quantitative benchmarking against market comparators, Organic Growth Analysis, pipeline analysis, pay and performance analysis, results of time and productivity study, and evaluation of enablement system
- Identification of what’s working well and areas for improvement



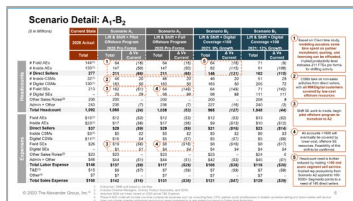
### Commercial Blueprint

- Develop recommendations to address gaps and optimize future state commercial model across sales strategy, structure, and management
- Particular emphasis on opportunities for structural changes, including GTM roles and org structure, as well as compensation for commercial contributors
- Demand generation process and blueprint



### Initiative Roadmap

- Develop a list of initiatives to drive top-line growth
- Prioritize initiatives by degree of impact, cost/effort, timing, and feasibility
- Work with stakeholders to align on ‘Quick Win’ initiatives to implement in the immediate future



### Financial Cost & Impact for Key Initiatives

- Create financial business case to estimate cost and top-line uplift associated with key, ‘Quick Win’ initiatives
- Present to key stakeholders as a component of the ‘case for change’

# Example GTM Diagnostic & Blueprint Project Timeline

## Project Phase & Objective

### Current State

Stakeholders & leaders "stack-hands" on the "as-is"

### Routes to Market

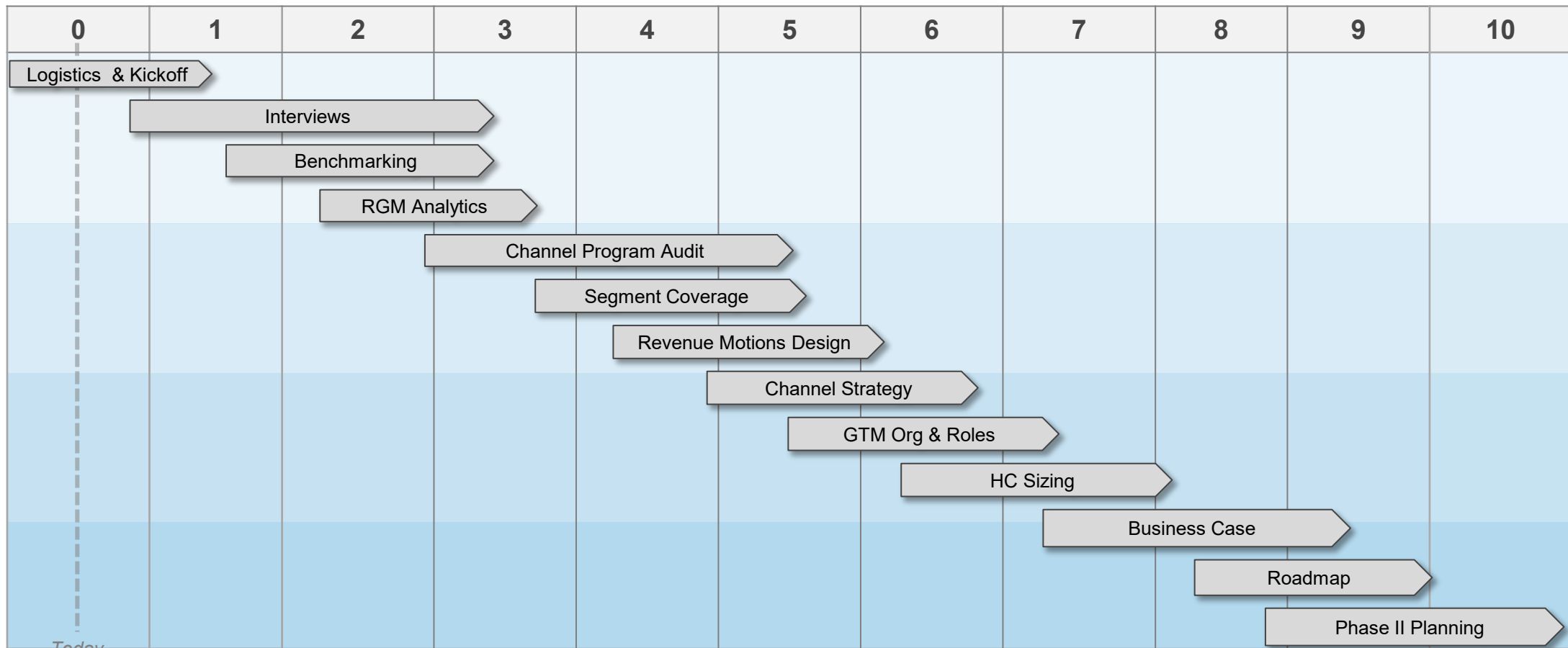
Evaluate the current channel strategy and evolve the routes to end user engagement

### Coverage and Sizing

Align on a coverage that can achieve both OpEx & growth targets

### Business Case & Plan

Business accepts AGI recommended initiatives & roadmap



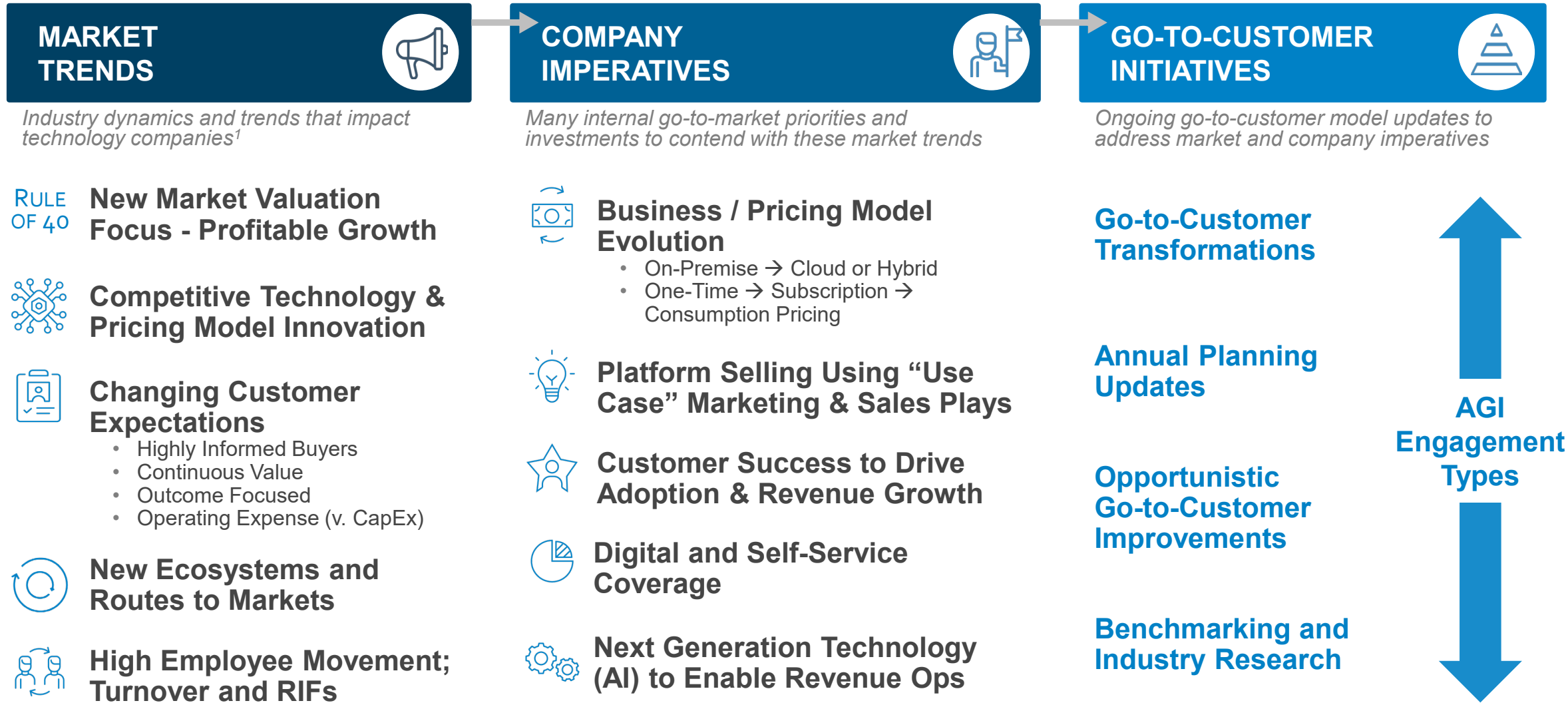
Design Team / PM	PM Kick Off			Diagnostic Readout Preview		Design Team Meeting	Design Team Meeting	Design Team Meeting	Blueprint Readout Preview	
SteerCo		Project Kick Off			Diagnostic Readout					Blueprint Readout



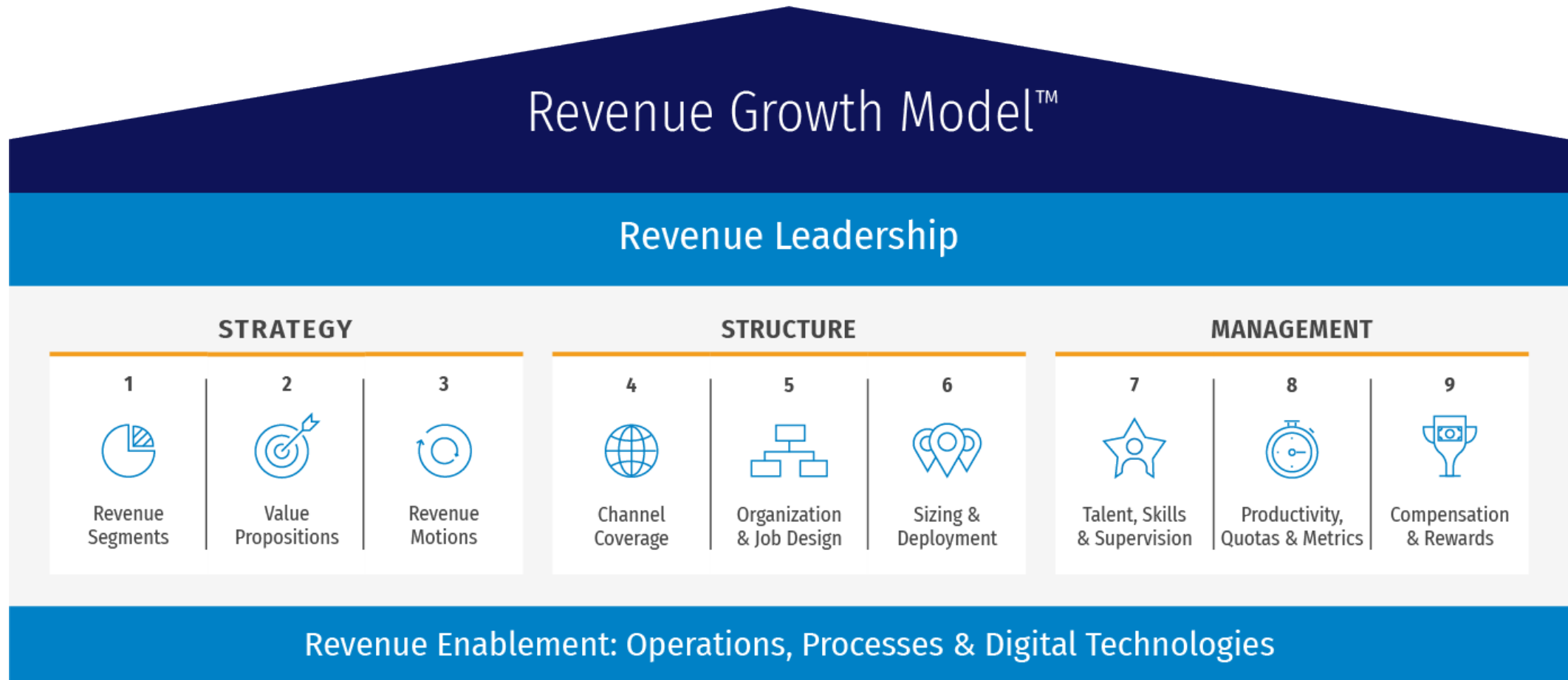


# Alexander Group Point-of-View

# Tech Market Trends & Imperatives Drive GTC Initiatives



# Alexander Group – Revenue Growth Model™



# XaaS Companies Must Drive Both Revenue Growth and Profitability in Order to Maximize Valuation

## Growth & Margin Index AKA Rule of 40

$$\text{ARR Growth Rate \%} + \text{EBITDA Margin \%} = \text{Profitable Growth \%}$$

Measured By

# of Opportunities



Average Sales Price



Velocity



Win Rate

Measured By

Seller Productivity



Investments

(Coverage, Sales Compensation, Enablement, Digital Technologies)

Measured By

Higher Valuation if >40<sup>1</sup>

<sup>1</sup> XaaS companies with ARR Growth + EBITDA Margin higher than 40% make up 50% of publicly traded XaaS companies, but 80% of market capitalization (Source: Piper Jaffray)

# AGI Research Indicates Companies Focus on Four Key Mandates To Maximize Valuation

## Growth & Margin Index

AKA Rule of 40

ARR Growth Rate %

+

EBITDA Margin %

=

Profitable Growth %

(Higher Valuation if >40<sup>1</sup>)

<sup>1</sup> XaaS companies with ARR Growth + EBITDA Margin higher than 40% make up 50% of publicly traded XaaS companies, but 80% of market capitalization (Source: Piper Jaffray)

## Go-To-Market Mandates for Growth & Margin

- 1 **DRIVE HIGH SELLER PRODUCTIVITY**
- 2 **MANAGE COST OF SALES**
- 3 **EFFICIENTLY ACQUIRE NEW REVENUE**
- 4 **MAINTAIN & GROW EXISTING ACCOUNTS**

## Related Key Metrics

New + Expand ACV Bookings per Seller

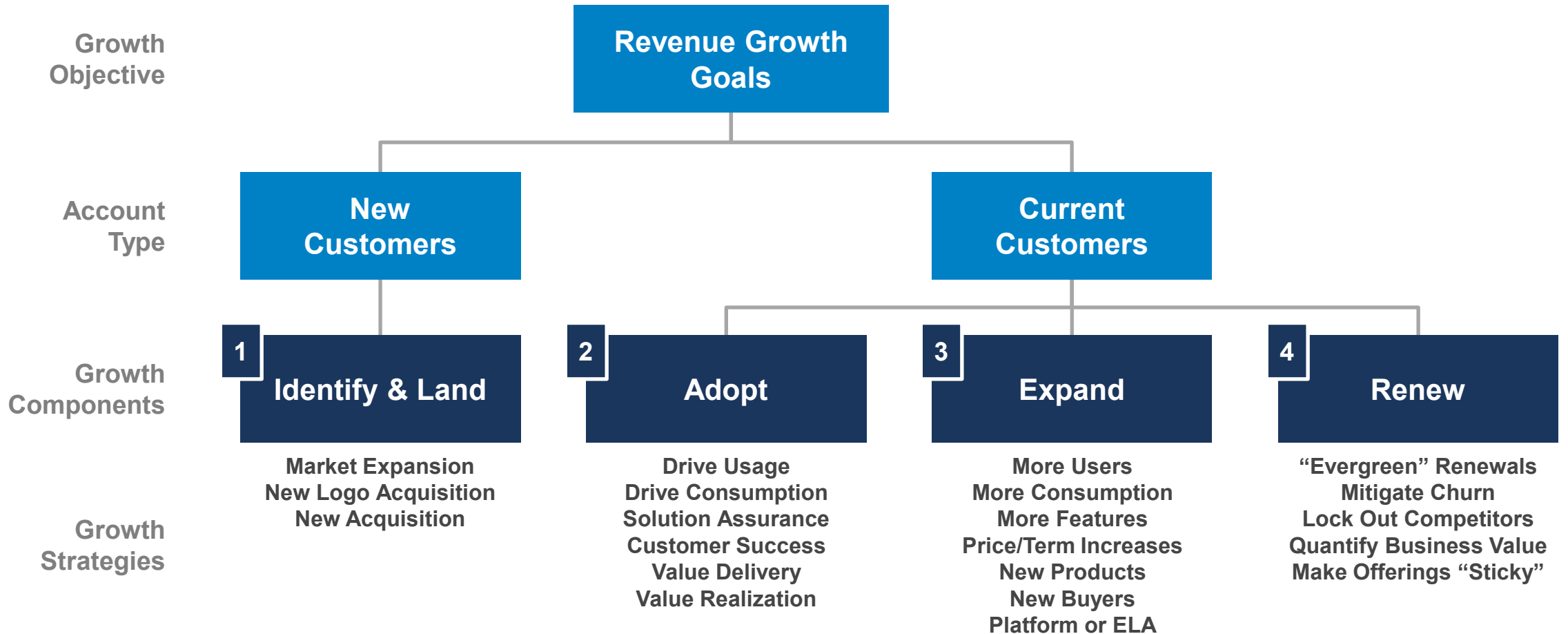
Sales & Marketing Expense to Revenue

CAC Ratios; Demand Stimulation Investments

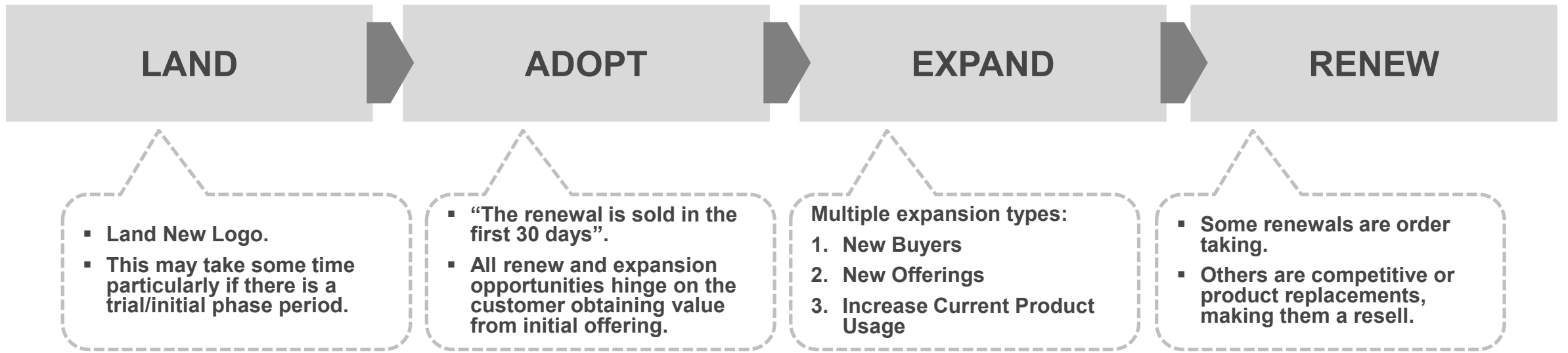
Net Revenue Retention Rate



# To Achieve Revenue Goals, Companies Must Focus on Four ILAER Revenue Growth Drivers

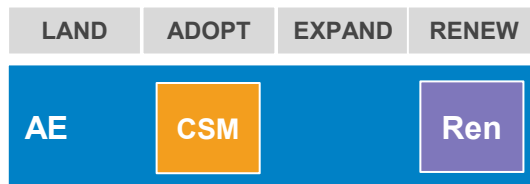


# Use LAER to Design Jobs

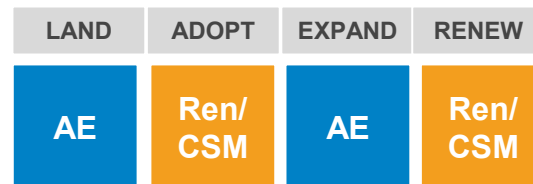


## EXAMPLE COVERAGE MODELS

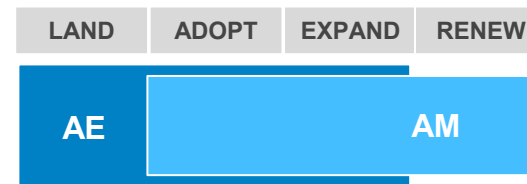
### Single Account Ownership



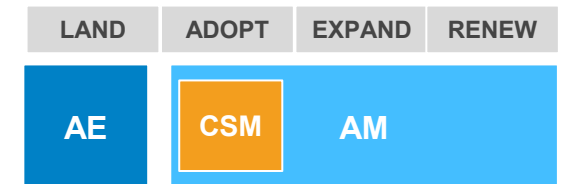
### Cooperative Account Ownership



### Teamed Account Ownership



### Bifurcated Account Ownership



Legend: AE = Account Executive | AM = Account Manager | CSM = Customer Success Manager | Ren = Renewal Rep

# Example Shotgun Scatter of MQL vs. Win Rate (referenced on 7/10 Circle Call)

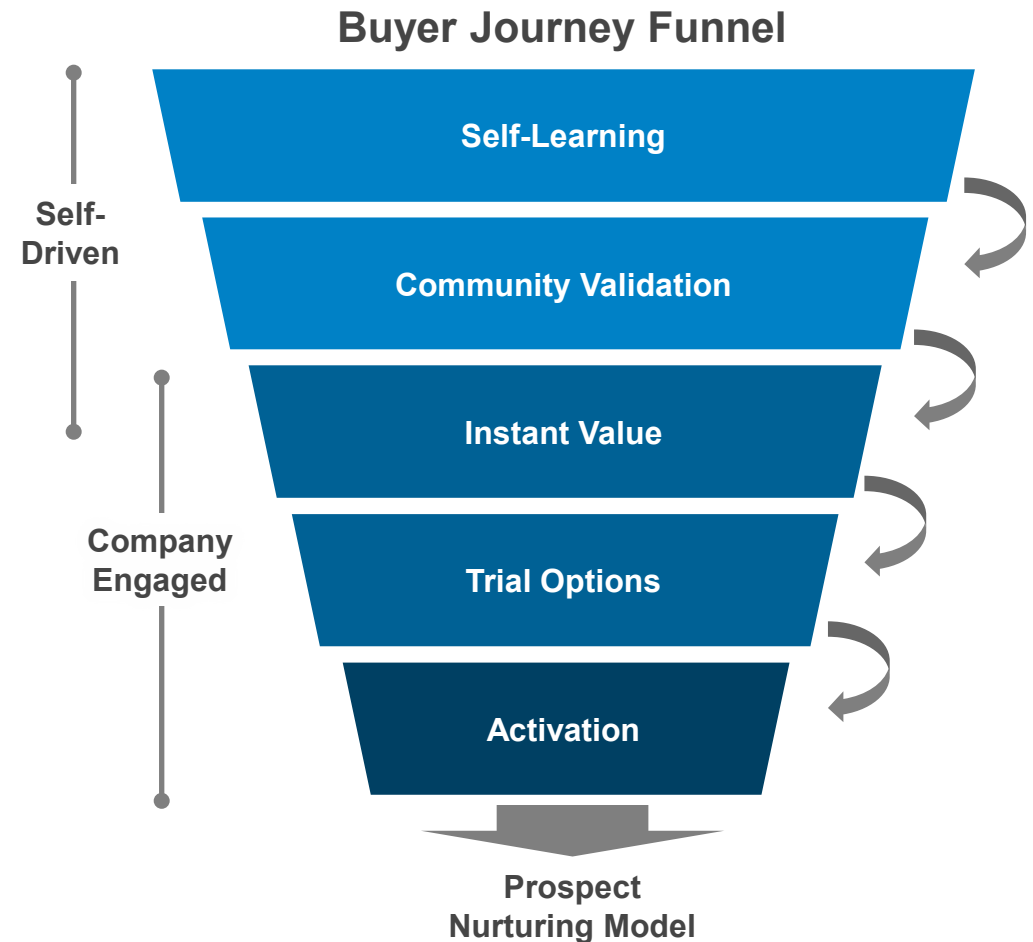
This analysis shows the MQL volume being produced in relation to your company's ICP & target industries. It also looks at how those MQLs convert into wins sales qualified and close won opportunities.

Industry	Target Industry	Year 1				Year 2			
		MQLs	S0s	Wins	S0 Win %	MQLs	S0s	Wins	S0 Win %
Blinded	✓	1,387	541	99	18.3%	1,213	529	74	14.0%
Blinded	✓	643	307	31	10.1%	567	257	33	12.8%
Blinded		155	55	0	0.0%	127	46	4	8.7%
Blinded		99	39	5	12.8%	92	30	0	0.0%
Blinded		79	40	6	15.0%	87	50	5	10.0%
Blinded		53	19	0	0.0%	65	15	0	0.0%
Blinded	✓	51	24	5	20.8%	60	30	3	10.0%
Blinded	X	45	17	0	0.0%	57	25	3	12.0%
Blinded	X	55	28	1	3.6%	49	29	1	3.4%
Blinded		62	25	0	0.0%	49	25	0	0.0%
Blinded	X	38	18	1	5.6%	45	18	1	5.6%
Blinded	X	62	29	5	17.2%	41	24	2	8.3%
Blinded	X	45	16	3	18.8%	37	17	0	0.0%
Blinded		35	14	0	0.0%	36	9	1	11.1%
Blinded		27	14	1	7.1%	36	14	1	7.1%
Blinded	Pilot	35	16	1	6.3%	35	16	4	25.0%
Blinded		31	13	1	7.7%	30	13	0	0.0%
Blinded		39	21	3	14.3%	28	11	3	27.3%
Blinded		36	11	3	27.3%	28	12	2	16.7%
Blinded		46	9	0	0.0%	27	3	0	0.0%
Blinded		27	17	1	5.9%	26	15	3	20.0%

# IDENTIFY & LAND: Fuel the New Logo Growth Engine Using the Most Effective Resource at the Right Stage

## BEST PRACTICES AND TRENDS

- Use omni-channel and virtual engagement methods throughout the non-linear buyer journey
- Leverage value propositions aligned to use cases and buyer personas
- Use account-based marketing and scoring to identify warm leads and scripts
- Evolve the traditional lead generation rep into a digitally-enabled prospect engagement rep
- Position marketing as a key lower-segment revenue generator
- Enable an end-to-end customer & contact tracking by using single source across marketing, sales & service



## 2 ADOPT: Maximize Value Realization Via a Customer Success Mindset

### BEST PRACTICES AND TRENDS

- Build a customer success mindset that includes actions and investments across the company
- Align the core seller and CSM responsibilities to maximize value realization
- Develop and manage customer success plans (in addition to account plans)
- Use metrics and automation to track and analyze value realization
- Design the CSM role to maximize high-value time and expanded role
- Align CSM incentives to adoption and potential renewal/expansion responsibilities

### Customer Success Mindset



# EXPAND: Define Specific Upsell & Cross-Sell Strategies to Maximize Revenue Growth and Valuation

## BEST PRACTICES AND TRENDS

- Prioritize and assign expansion motions to achieve your organization's growth plan
- Align coverage model, jobs, and compensation programs to drive your prioritized expansion motions
- Capitalize on “use case value chains” to maximize expansion opportunities
- Build a targeted contact nurturing program to increase awareness and trust with more key stakeholders
- Use lead generation reps and account-based marketing to improve account penetration

## Expansion Motions

<i>Category</i>	<i>Types</i>	<i>Description</i>
UPSELL	MORE USERS	Get more users to use the solution
	MORE CONSUMPTION	Get users to consume more of the solution (more use cases or volume)
	MORE FEATURES	Get the customer to turn on more features, assuming feature-based pricing
	PRICING INCREASES	Increase price or term length during contract negotiation
CROSS-SELL	NEW USE CASES	Sell current product to existing buyer for a new use case
	NEW PRODUCTS	Sell new products to existing buyers
	NEW BUYERS	Sell existing or new products and/or uses cases to new buyers
	PLATFORM/ELA <sup>1</sup>	Sell full solution to executives and then drive adoption across all user groups

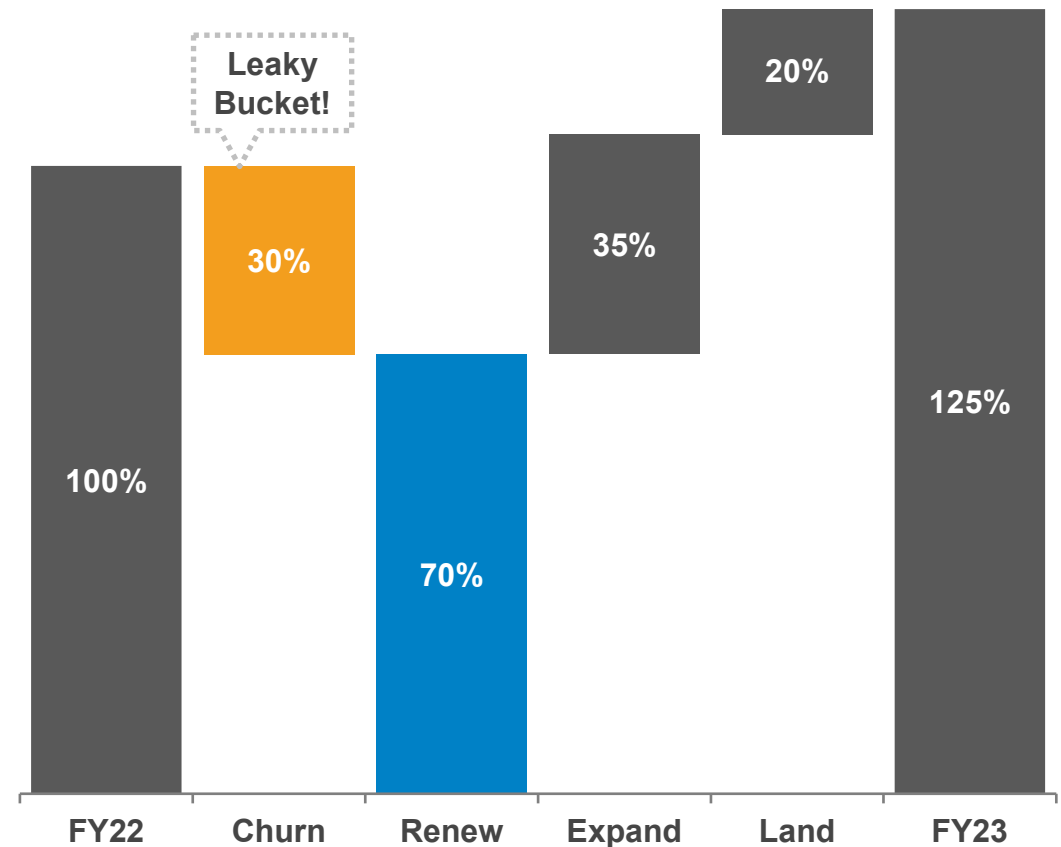


# RENEWAL: Minimize Account Revenue Churn to Protect Your Growth Engine

## BEST PRACTICES AND TRENDS

- Set core seller renewal focus based on renewal type (resell vs. reorder)
- Enable CSMs to drive value realization ahead of renewals
- Reduce renewal costs by employing dedicated license renewals teams
- Create playbooks to drive early renewal, migration and growth discussions
- Use early warning system to predict churn and focus resources

## Organic Growth Analysis



# Join Our Community



## FORUM SERIES

Focused on strategy, operations and implementation, the annual Leadership Forum series of events provides participants with strategic and tactical insights from highly regarded speakers, executive panelists and the revenue growth experts at Alexander Group.



## SUMMITS

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## ROUNDTABLES

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## WEBINARS

Virtual events covering revenue, sales-centric and sales compensation topics for executives, sales, marketing, sales/commercial operations and HR/compensation leaders. Recorded webinars are available on-demand.



## SYMPOSIUMS

Topic-focused, one-day events that combine Alexander Group research with deep insights from leading industry practitioners. Built around today's most important sales management issues and a unique opportunity to collaborate with peers.



## SURVEYS & RESEARCH STUDIES

Alexander Group sponsors multiple industry-specific research studies each year, along with targeted client-sponsored surveys. AGI sales compensation and sales pulse surveys are conducted annually.



## SALES BENCHMARKING

The value of sales analytics rests in having quality data, client context and expert interpretation. Alexander Group-cultivated benchmarks provide quantitative insights to event and study participants.

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# 2024 Alexander Group Research & Events

Technology Industry Practice



		FEBRUARY	MARCH	APRIL	MAY	JUNE
RESEARCH	RESEARCH Sales Pulse Survey Report			RESEARCH Revenue Operations Survey Report	RESEARCH AI Executive Research Report	RESEARCH Marketing Survey Report
	RESEARCH Sales Comp Trends Survey Report					RESEARCH GTM Coverage Study Report
HOSTED EVENTS	EVENT Pricing Strategies: Understanding and Assessing the Latest Pricing Models Webinar   February 14			EVENT Women Revenue Leaders Forum Chicago   April 30 – May 1	EVENT Technology: Expansion Roundtable Virtual   May 16	EVENT Pricing Strategies Webinar   June 12
	EVENT Technology: Evolving the Partner Program Roundtable Virtual   February 15			EVENT Sales Community Virtual   April 24	EVENT Revenue Symposium Virtual   May 20	EVENT Metrics That Measure Up Podcast   June 28
	EVENT EMEA Sales Compensation Roundtable Virtual   February 21				EVENT Marketing Summit Minneapolis, MN   May 21	
					EVENT EMEA Sales Compensation Roundtable Virtual   May 23	

		JULY	AUGUST	SEPTEMBER	OCTOBER	NOVEMBER
RESEARCH	RESEARCH Sales Comp Hot Topics Survey		RESEARCH TOPICS COMING SOON			RESEARCH Sales Pulse Survey
HOSTED EVENTS	EVENT Marketing Roundtable Virtual   July 25	EVENT Sales Compensation Symposium Virtual   August 13	EVENT Marketing Summit September 24	EVENT Technology Coverage Models Roundtable Virtual   October 16	EVENT EMEA Sales Compensation Roundtable Virtual   November 5	
		EVENT XaaS Sales Compensation Symposium San Francisco, CA   August 15	EVENT Sales Community Sales Compensation Virtual   September 30	EVENT Metrics That Measure Up Podcast   October 31	EVENT Executive Forum Palm Beach, FL   November 20-22	



GROWTH THROUGH  
**Convergence**



## Women Revenue Leaders Forum

April 30 – May 1, 2024

St. Regis Hotel | Chicago, IL



## Executive Forum

November 20 – 22, 2024

Breakers Resort | Palm, Beach, FL

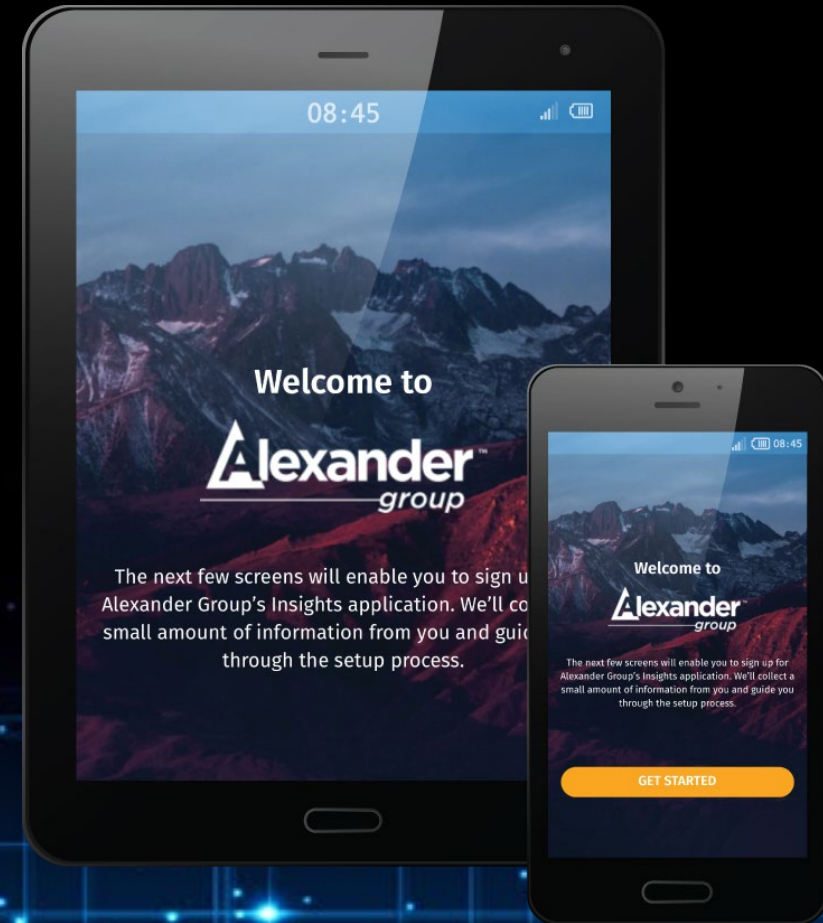
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