Go-To-Market Framework

About this Framework

Our Go-to-Market (GTM) approach involves a comprehensive analysis of key business areas, including pricing, product, people, and operations. We then provide tailored recommendations to automate your operations and develop robust strategies for sales operations, marketing operations, customer success (CS) operations, and finance operations.

While this is a framework, we will build out the operational foundations across your tech stack and have hundreds of custom dashboards across areas of sales, marketing, sales, cs and other areas. We then deliver a one stop shop for your business.

By implementing real-time dashboards, we ensure continuous monitoring and optimization of your business processes. This deck outlines our framework, offering a high-level overview without delving into the specific details of each area.

Contact us to learn more about how we can help your business thrive.

GTM FRAMEWORK OVERVIEW

The purpose of the GTM Framework is to break down the overall strategy into individual and actionable plays across the organization including Product, Marketing, Sales, Customer Success and Finance.

The playbook helps the team visualize targets, understand the continuous improvement model, and know what is needed to achieve goals and be successful.

The major steps of the workflows are defined and the specific activities in those areas are outlined.

The operations process is a continuous cycle of examining current workflows, identifying gaps and further refining roles, goals and processes to set up for scalability and success.

Breaking down actionable goals per team and key stakeholder, holds each individual accountable for processes and contribution within the revenue organization.

The result utilizes benchmarking across many teams all driven toward one strategic goal IN CENTRALIZED REAL TIME DASHBOARDS.

GTM DISCOVERY PROCESS

Where do we want to go?

STRATEGY DESIGN

Operationalize and documentation of product, process, service. Balanced measures and ongoing monitoring & corrective actions.

ORGANIZATION

Current organizational structure. Do we have the right people, and do they need training? Hiring new people and teams to scale.
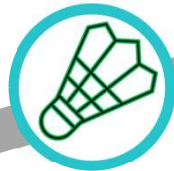
PRODUCT

Existing product, features. How would you compare vs. competitors? What important features are we missing? What are you trying to solve by using our product? ICP? How easy is it to use our product?

PROCESS

All processes from product, marketing and sales. To include systems used and workflows for each process.

KPI's & METRICS Single source of truth

PRICING

Current pricing structure, MRR vs. ARR. Ease of Ordering i.e. OF vs pure SaaS. Pricing by market and customer profile. Redistribution or white label? Partners?

PRODUCT ROADMAP

- What is the current roadmap?
- Current products, new products and apps
- Identify timelines and team involvement

2024			Q2			Q3
Jan	Feb	Mar	Apr	May	Jun	Jul
Web Team						
New Admin Console	3rd party integrations					
		Security 2.0	On premise backup		Code review	
			Self service portal	API	Shopping cart improvements	
Mobile Team						
Mobile mockup	UX Improvements	Cloud Support	UX Improvements			
	Media Campaign		Interactive dialogue	Automatic renewal	Ticketing system	
				Application upgrade	Q4 Initiative	
Marketing &Sales Team				Analytics	Performance management	
Market analysis	Customer Outreach		SEO Plan			
		Lead Gen	Pricing review		Content review	Productive email campaign

PRODUCT POSITIONING

Market Condition
- Market conditions in the industry. How is your industry performing in general?

Value Proposition
- What is the benefit, product, or service offer that would make someone want to become a customer?

Pricing Strategy
- What is the pricing strategy and how was it developed? Best practices around discounting

Marketplace Risks
- Risks in the marketplace or industry. This could be a strategic risk, compliance and regulatory risk, financial risk, or operational risk

Competitive Advantages
- What makes your business unique and comparatively stronger than competitors? What do you offer that no other company, product, or service does, or does as well?

Competitor Analysis
- Comparative Strength – What are your company's assets that this competitor does not have?
- Comparative Weakness – In what areas or attributes do your competitors outperform you?

New Market Opportunities
- New market opportunities that your business can expand into. This could be growing into a vertical industry or segment, possible new product lines, exploring new channels, or targeting different consumer niches
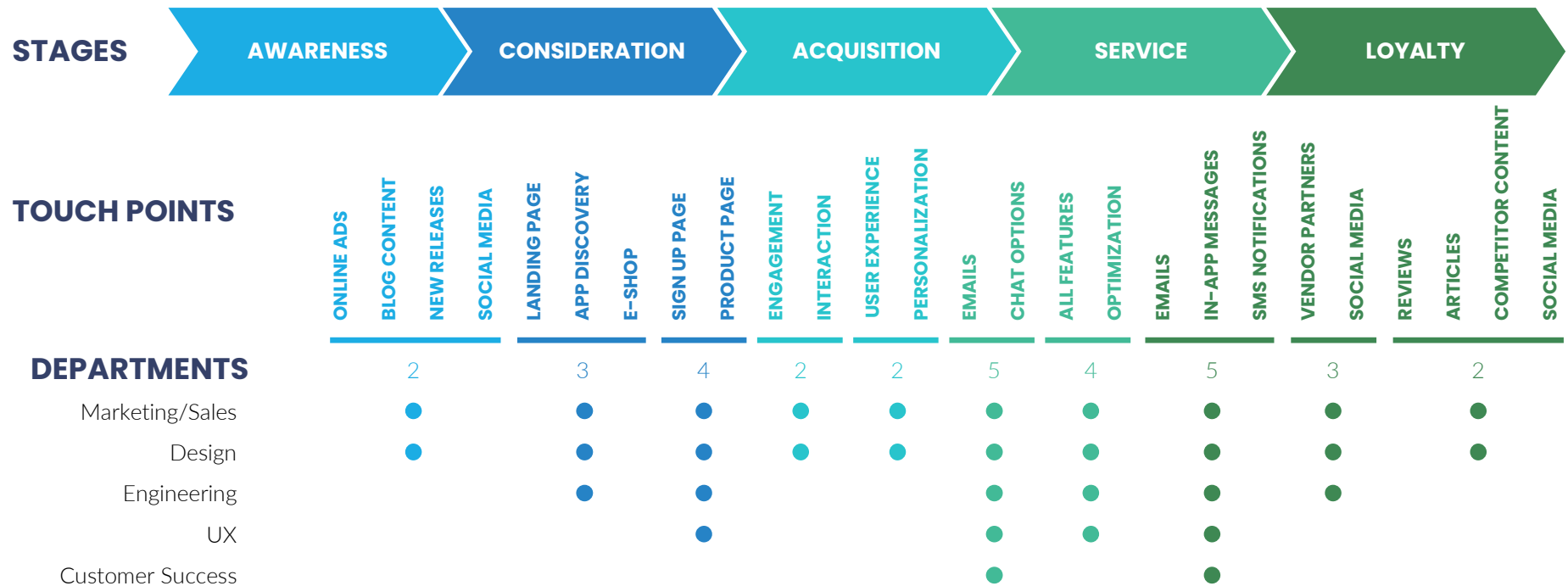
PRICE TABLE

- What is the current pricing strategy? Identify current commercial policy and gaps
- Did we test pricing in the market?
- Other sources i.e. white label, partners and whitespace opportunities

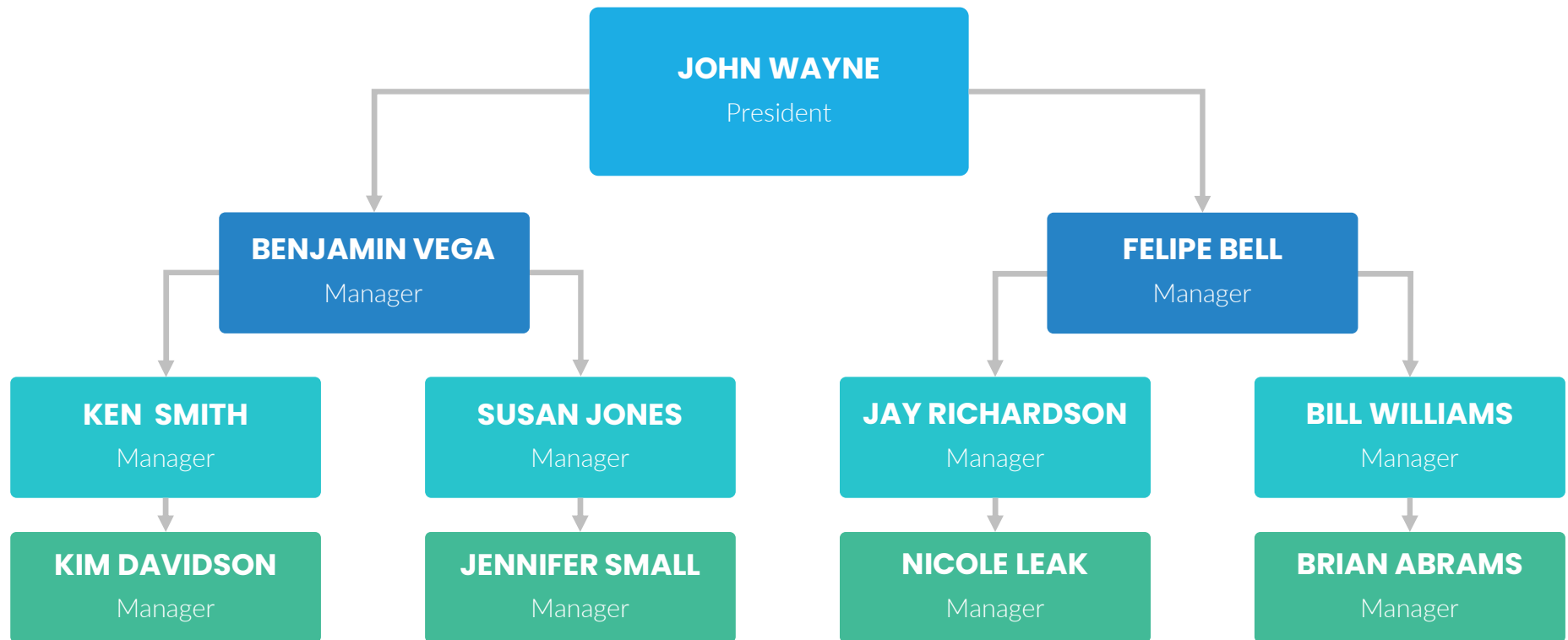| FEATURES	SILVER	GOLD	PLATINUM	DIAMOND
CONSUMER	5	25	100	300
RETAIL	1	3	10	10
CREDIT UNIONS	Basic	Better	Best	Best
WHOLESALE	Basic	Full	Full	Full
COMMERCIAL	No	Yes	Yes	Yes
BANKS	No	Yes	Yes	Yes
PRICING	$19.99/MO	$24.99/MO	$54.99/MO	$74.99/MO
	SUBSCRIBE	SUBSCRIBE	SUBSCRIBE	SUBSCRIBE

Sample

CUSTOMER JOURNEY MAP

- What is the current customer journey and process internally?
- Identify timeline, teams and touchpoints for each step

STAGES

AWARENESS	CONSIDERATION	ACQUISITION	SERVICE	LOYALTY

TOUCH POINTS

Touch points by stage:

- **AWARENESS:** ONLINE ADS, BLOG CONTENT, NEW RELEASES, SOCIAL MEDIA
- **CONSIDERATION:** LANDING PAGE, APP DISCOVERY, E-SHOP
- **ACQUISITION:** SIGN UP PAGE, PRODUCT PAGE, ENGAGEMENT, INTERACTION, USER EXPERIENCE, PERSONALIZATION
- **SERVICE:** EMAILS, CHAT OPTIONS, ALL FEATURES, OPTIMIZATION, EMAILS, IN–APP MESSAGES, SMS NOTIFICATIONS
- **LOYALTY:** VENDOR PARTNERS, SOCIAL MEDIA, REVIEWS, ARTICLES, COMPETITOR CONTENT, SOCIAL MEDIA

DEPARTMENTS

Group counts: 2, 3, 4, 2, 2, 5, 4, 5, 3, 2

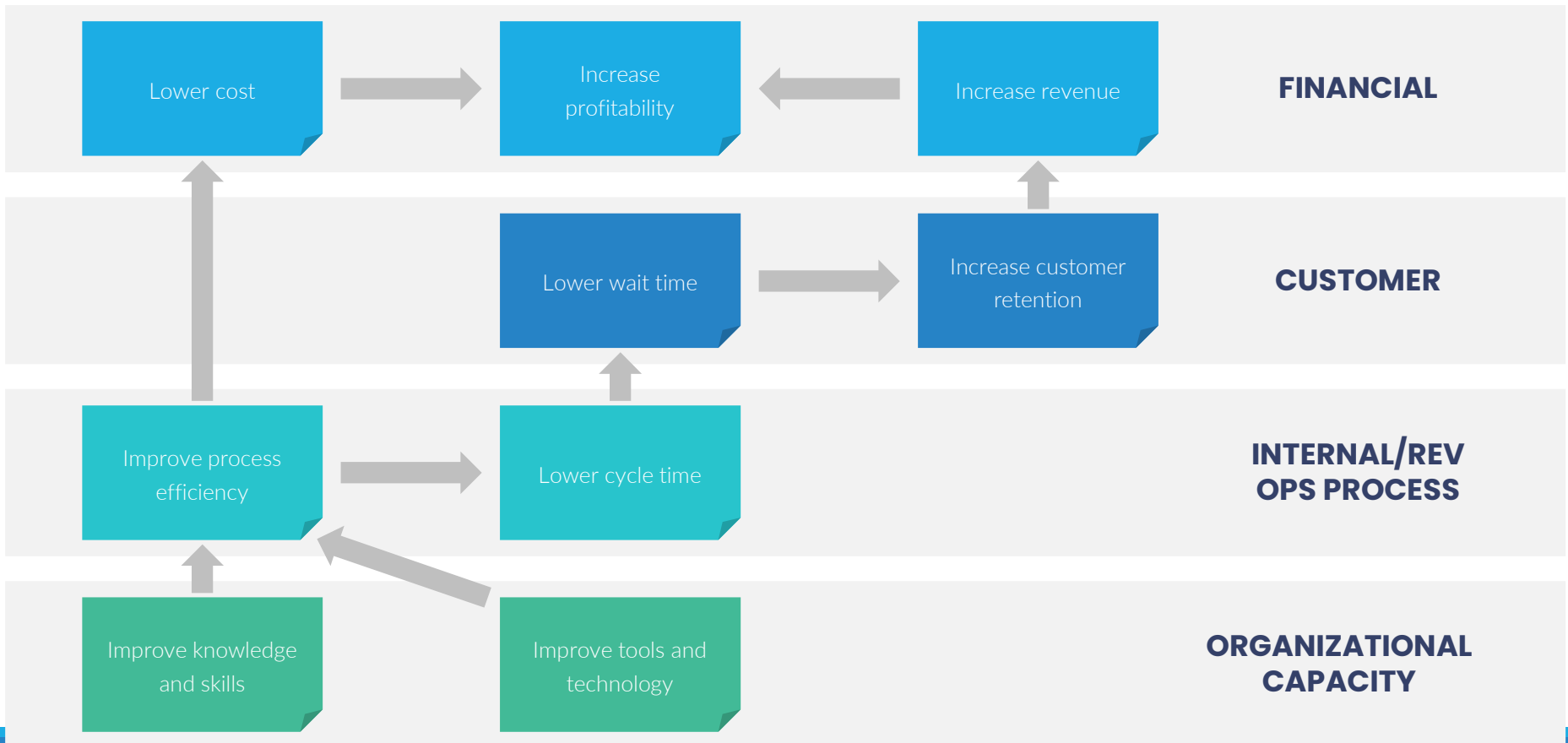| Department	ONLINE ADS / BLOG CONTENT / NEW RELEASES / SOCIAL MEDIA (2)	LANDING PAGE / APP DISCOVERY / E-SHOP (3)	SIGN UP PAGE / PRODUCT PAGE (4)	ENGAGEMENT / INTERACTION (2)	USER EXPERIENCE / PERSONALIZATION (2)	EMAILS / CHAT OPTIONS (5)	ALL FEATURES / OPTIMIZATION (4)	EMAILS / IN–APP MESSAGES / SMS NOTIFICATIONS (5)	VENDOR PARTNERS / SOCIAL MEDIA (3)	REVIEWS / ARTICLES / COMPETITOR CONTENT / SOCIAL MEDIA (2)
Marketing/Sales	●	●	●	●	●	●	●	●	●	●
Design	●	●	●	●	●	●	●	●	●	●
Engineering		●	●			●	●	●	●	
UX			●			●	●	●		
Customer Success						●		●		

ORGANIZATIONAL MAPPING

- Do we have the right people and do we need to hire more
- What is the current org chart and how do we shape it to scale

JOHN WAYNE
President

BENJAMIN VEGA
Manager

FELIPE BELL
Manager

KEN SMITH
Manager

SUSAN JONES
Manager

JAY RICHARDSON
Manager

BILL WILLIAMS
Manager

KIM DAVIDSON
Manager

JENNIFER SMALL
Manager

NICOLE LEAK
Manager

BRIAN ABRAMS
Manager

CROSS FUNCTIONAL GOALS

- Identify Gaps and begin Strategic Design to Profitability
- Map Current State with Future State across teams

Lower cost	→ Increase profitability	← Increase revenue	**FINANCIAL**
	Lower wait time	→ Increase customer retention	**CUSTOMER**
Improve process efficiency	→ Lower cycle time		**INTERNAL/REV OPS PROCESS**
Improve knowledge and skills	Improve tools and technology		**ORGANIZATIONAL CAPACITY**

Sample

REVENUE OPERATIONS SYSTEMS

What systems are currently used for Marketing, Product Marketing, Sales, Customer Success and Finance? Map out existing process to identify gaps in workflows and system design.

Identify Data Gaps and establish new data consistency. Data must be accurate and consistent throughout the organization. There must be one truth in data rather than disparate systems.

Salesforce, HubSpot, Finance Systems and various spreadsheets across the organization must be cleansed and constantly maintained for data accuracy.

Data from SalesForce, HubSpot, Finance Systems and various spreadsheets are then aggregated into one main truth in Smartsheet.

PROCESS MAP DESIGN

- What are the current processes for each team and all activities.
- Map out Current Vs. Future State for each team and ALL workflows
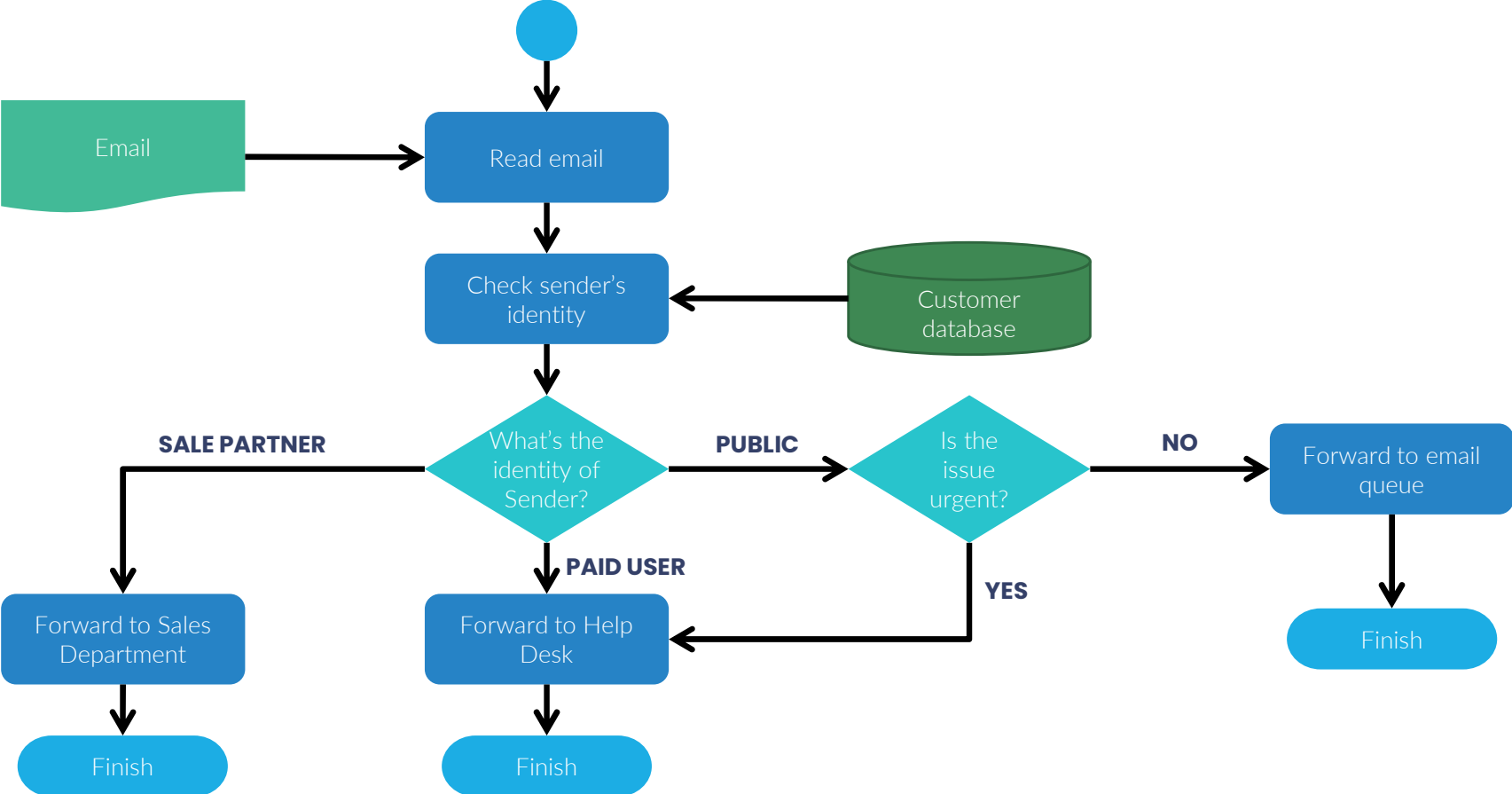
% of REVENUE BY TEAM

- Reverse engineer revenue goals by team
- Assign a revenue target to each team then by person
- Break down # of leads needed to fill Top of Funnel to hit goals
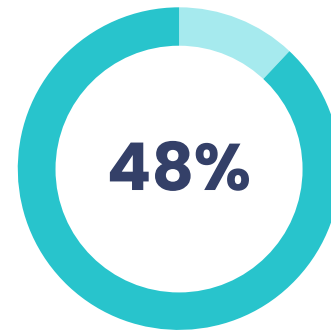
25%

25%

48%

2%
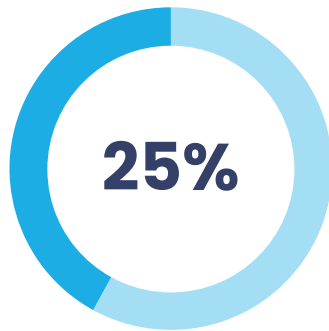
MARKETING
- Inbound
- Digital
- Events
- Ads
- Webinars
- Website conversion
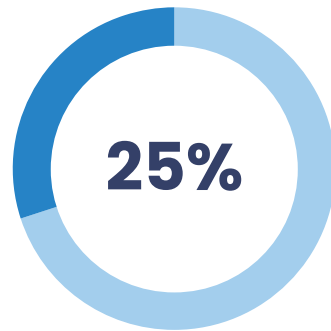
BUSINESS DEVELOPMENT
- Outbound
- Drip campaigns
- Sequences
- LI
- ZoomInfo, Outreach.io,etc

SALES
- Outbound
- Drip campaigns
- Targeted Sequences
- TAM assignment
- LI
- ZoomInfo, Outreach.io,etc
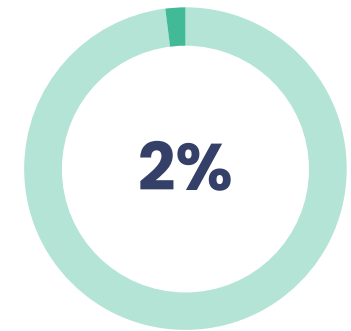
CUSTOMER SUCCESS
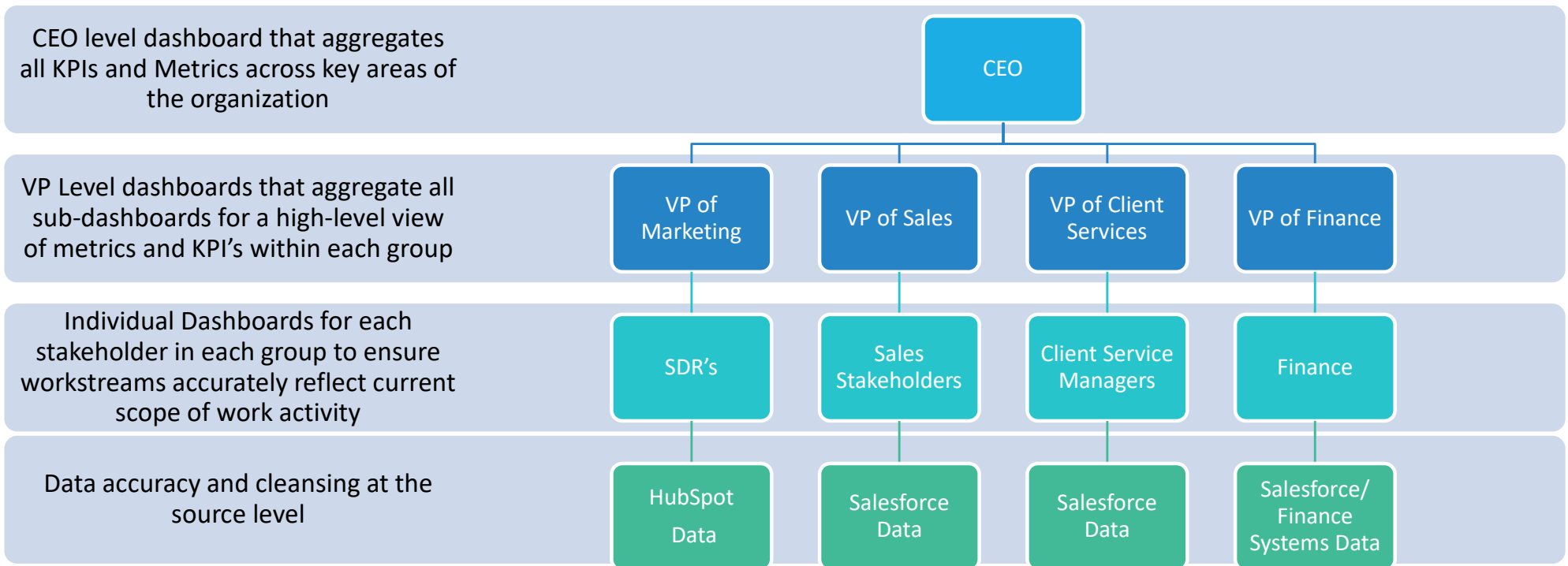- Retention
- Upsell
- Cross Sell
- Case Studies

QUARTERLY REVENUE GOALS

- Revenue targets identify how to spread cost and target goals by team
- Identify how much funnel is needed based on historical conversion and close rates
- Identify how many leads are needed by each team to hit targets

Dept Name	1Q2024			2Q2024			3Q2024			4Q2024		
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Marketing												
Business Development												
Sales												
Customer Success												
Other Revenue Generating Centers (Partners, Affiliates)												

REVENUE OPERATIONS AND KPI HIERARCHY

The Revenue Operations KPI hierarchy further breaks down data, ownership, goals and tracking. This is to ensure data accuracy within all systems for better business decisions based on various metrics and KPI's across the organization. It begins with ensuring data accuracy for proper reporting. Each stakeholder has an individual dashboard to ensure their current workstream is accurate. Each Stakeholder workstream and KPI's roll up into the VP level dashboard. All VP level dashboards will roll up into a main CEO dashboard where there is proper measurement across the organization. All levels are held accountable at their stage in the process.
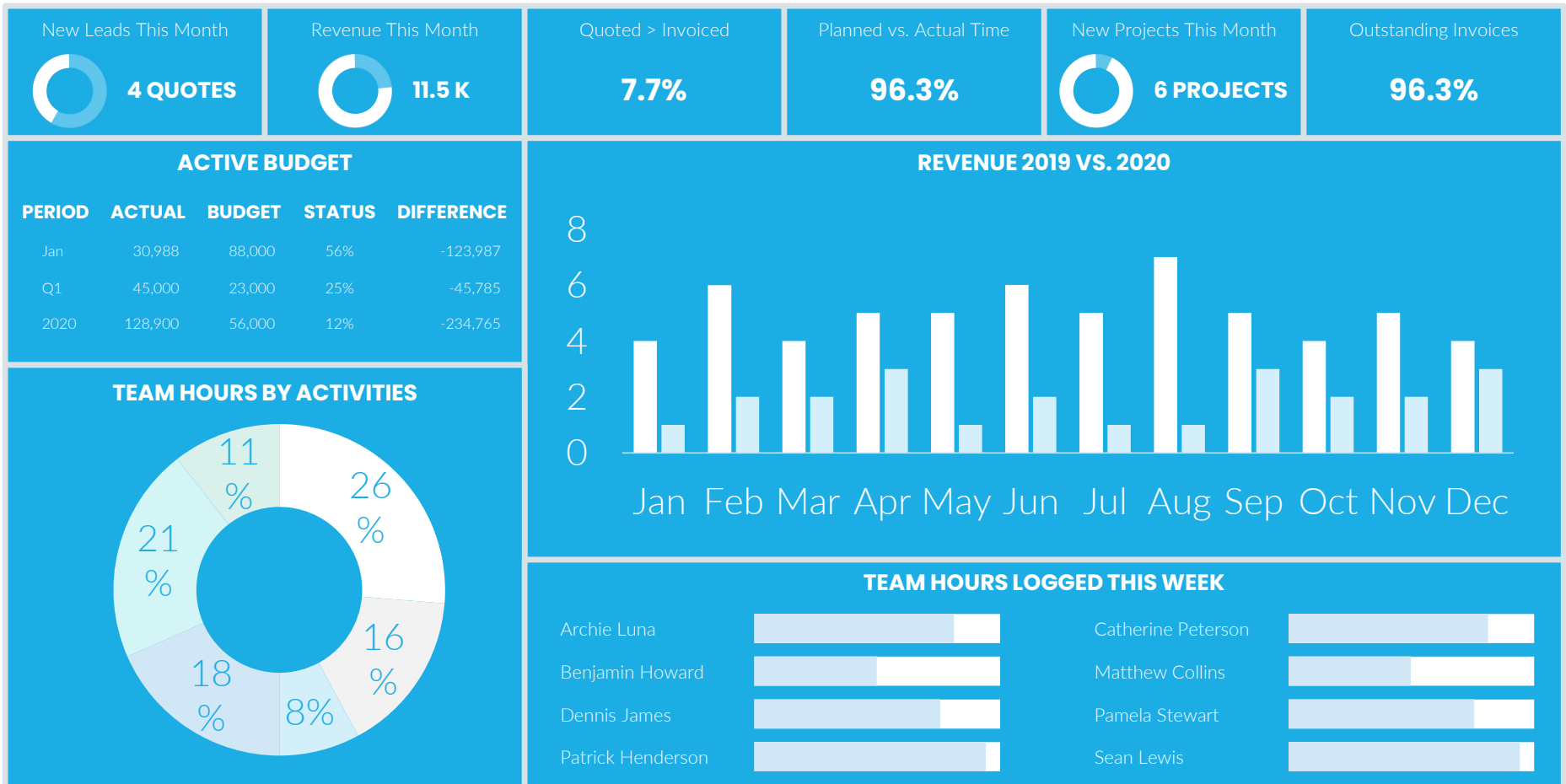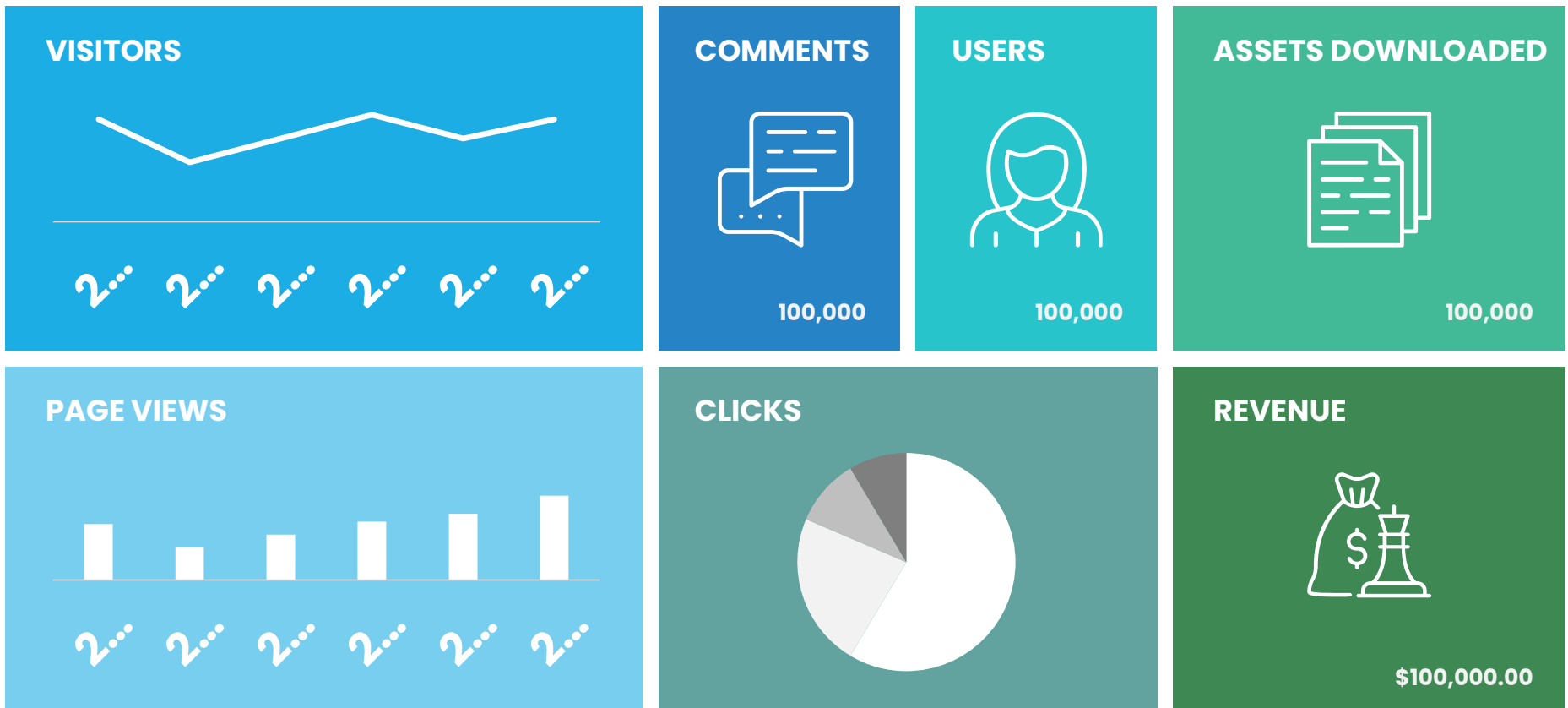
CEO level dashboard that aggregates all KPIs and Metrics across key areas of the organization	CEO			
VP Level dashboards that aggregate all sub-dashboards for a high-level view of metrics and KPI's within each group	VP of Marketing	VP of Sales	VP of Client Services	VP of Finance
Individual Dashboards for each stakeholder in each group to ensure workstreams accurately reflect current scope of work activity	SDR's	Sales Stakeholders	Client Service Managers	Finance
Data accuracy and cleansing at the source level	HubSpot Data	Salesforce Data	Salesforce Data	Salesforce/ Finance Systems Data

GTM and REV OPS Dashboards SAMPLES

KPI DASHBOARD

You can't track anything that you can't measure

New Leads This Month	Revenue This Month	Quoted > Invoiced	Planned vs. Actual Time	New Projects This Month	Outstanding Invoices
4 QUOTES	11.5 K	7.7%	96.3%	6 PROJECTS	96.3%

ACTIVE BUDGET

PERIOD	ACTUAL	BUDGET	STATUS	DIFFERENCE
Jan	30,988	88,000	56%	-123,987
Q1	45,000	23,000	25%	-45,785
2020	128,900	56,000	12%	-234,765

TEAM HOURS BY ACTIVITIES

26%
16%
8%
18%
21%
11%

REVENUE 2019 VS. 2020

8
6
4
2
0

Jan Feb Mar Apr May Jun Jul Aug Sep Oct Nov Dec

TEAM HOURS LOGGED THIS WEEK

Archie Luna

Benjamin Howard

Dennis James

Patrick Henderson

Catherine Peterson

Matthew Collins

Pamela Stewart

Sean Lewis

MARKETING DASHBOARD SLIDE

- All campaigns should have specific metrics to ensure effectiveness
- Open rates, clicks, asset download pages, and downstream closed won from marketing leads

VISITORS

COMMENTS

100,000

USERS

100,000

ASSETS DOWNLOADED

100,000

PAGE VIEWS

CLICKS

REVENUE

$100,000.00

Sample

CAMPAIGN OPTIMIZATION KPI DASHBOARD

NEW LEADS

OPTIMIZING LEADSCORING
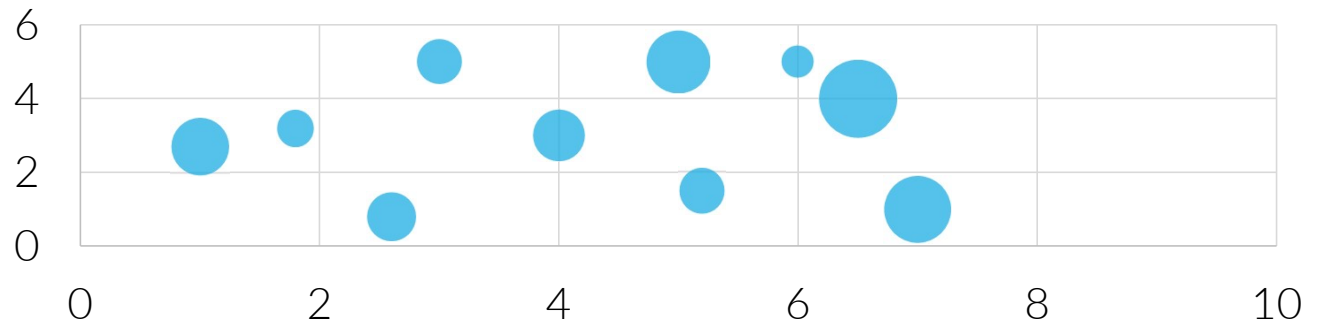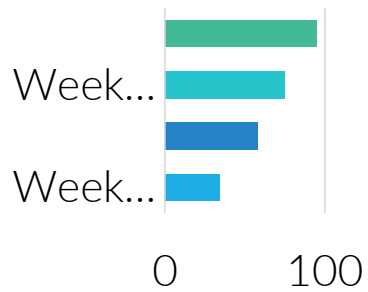
TOP CAMPAIGNS
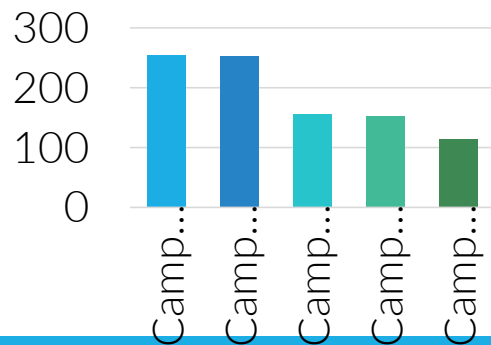
LEADS CONVERTED VS. COST TREND

Non-Interest Income   Interest Income

www.Stradgy.com