



# How to Make a Go-to-Market Methodology Stick.

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# PART ONE: HOW TO PICK A GTM METHODOLOGY

So you want to optimize your go-to-market?

Perhaps you feel your sales team could be more efficient?

Maybe you believe sales needs to be trained in this methodology or that?

Perhaps you had great success with a methodology in the past, and you know if you could get a methodology installed in your current company, it would up everyone's game and improve results.

If you've had positive experiences in the past running a sales methodology, you are likely to lean toward that methodology again, but you're also aware of the old adage:

***“The best methodology is the one that gets adopted.”***

So does it really matter which methodology you choose? As long as it's being followed/tracked/

measured, right?

Yes and no.

**Yes** - It's important that your sales organization all operates from the same playbook. And in that sense, any methodology is better than no methodology.

But **No** - which methodology really does matter. It depends what you are trying to accomplish.

And a methodology is just part of the answer. If what you are looking for is consistency and effectiveness across the entire revenue organization, what you need is not a sales methodology, but a GTM methodology. And if you want all those activities to sync to a backbone of consistent metrics, and a holistic growth model that contemplates demand generation and acquisition and activation and retention and growth loops - what you really need is a Revenue Operating Model.

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## ~~Sales Methodology~~ ~~Go to Market Methodology~~ **Revenue Operating Model**

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### Go-To-Market (GTM) Methodology vs. Operating Model

Beyond \$10M in Annual Recurring Revenue, a revenue organization operates as a factory. The Go To Market (GTM) team consists of Product, Marketing, Sales, and Customer Success, who work together to produce revenue.

In physical manufacturing, Kaizen, Six Sigma, and Lean Manufacturing are methodologies designed to increase the quantity and quality of production, while reducing cost.

In our GTM factory, we want to increase revenue, improve customer outcomes, and decrease costs.

The objectives are the same, so where is the Kaizen for GTM?

- A *Methodology* defines how a GTM team member behaves: contextual awareness, skills, process

- An *Operating Model* defines the parameters of the system within which these GTM team members work.

The Revenue Operating Model lays out the processes and mathematical principles that underpin the quantity, quality and cost of revenue production.

- How do your customers prefer to buy?
- How can you organize to serve them?
- What processes are best employed to maximize revenue and impact while minimizing cost?

Part of defining your Revenue Operating Model is picking your GTM motion(s). This is highly specific and dependent on the needs of your specific market. For instance:

- An outbound GTM model would be the exact wrong choice for a low-price, self-service product

- A product-led-growth GTM model would be perfectly wrong for complex, bespoke solutions

And whatever model you choose, it needs to be defined and executed as a set of consistent processes, relying on common language, a measurement structure that allows you to monitor what is within tolerance, and what needs to be addressed, and a system for addressing issues that arise.

The process-driven organization does not assign blame or credit to individual humans. If something goes right, it is (hopefully) due to a successful execution of process. If something fails, either the process is wrong, or it was poorly executed.

A GTM Methodology, combined with a Revenue Operating model, provide the framework for establishing a process culture and an architected revenue machine.

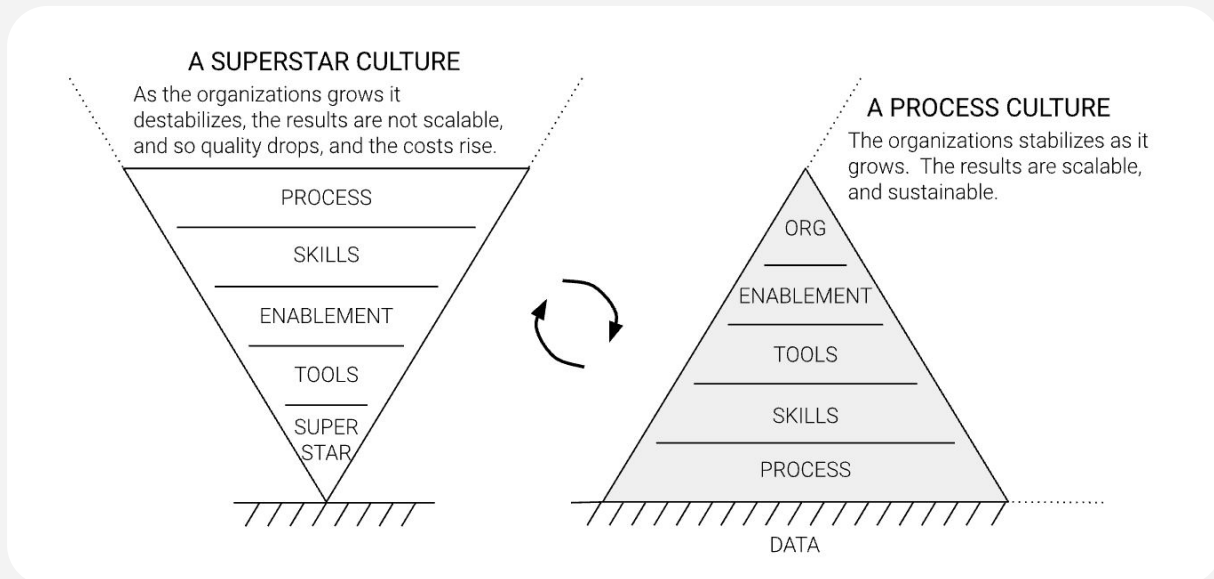


Figure 1. A comprehensive Revenue Operating Model goes beyond skills training to define your data model, process, tools, enablement, and perhaps even organization and compensation design.

## How to Pick the Right GTM Methodology for Your Business

You're convinced you need a GTM Methodology, and you want to ensure you choose one suited to your business.

All methodologies typically include:

- Common language (diagnostic framework, customer impact)
- Coaching framework (knowledge, skills, certification)
- Ability to codify into CRM (real-time-coaching, turn-by-turn directions)

But beyond that, the details of the methodology matter.

Questions to ask yourself include:

1. Does this methodology make it easy for customers to buy from you?
2. Is this methodology relevant for all Go To Market teams (marketing, sales, customer success)?
3. Is this methodology customer-centric: focused on achieving customer impact, rather than merely qualifying deals?
4. Is this methodology flexible enough to incorporate things already working well within your organization?
5. Is this methodology easy to measure within the systems you already have? Can it be integrated into your tech stack beyond CRM (e.g., sales engagement, CS management, and conversational intelligence)?
6. Can you continue to evolve and build on this methodology independently without incurring ongoing licensing fees?
7. What is the methodology activation plan for executives, frontline managers, and individual contributors? (see the next section for more on that)
8. What enablement materials are available to provide reps turn-by-turn directions on how to implement the required process and skills?

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*“We’re creating a Revenue Architecture and a consistent, common language throughout the entire customer journey. I foresee a day when the BDR organization shapes the experience from the beginning, and that same experience runs all the way to a CS consult, transforming what we're doing in terms of CS operations.”*

*- Julien Cerutti, Meltwater*

## Leadership Alignment

Sometimes we mistakenly believe that whoever holds the budget for implementing a methodology also holds the responsibility for ensuring success. That's a logical conclusion, but it assumes too much of one leader. One leader cannot succeed in a GTM transformation without alignment across the entire organization.

**Question:** Where does the budget live for implementing a GTM methodology or GTM Operating Model?

**Answer:** That's not the operative question. No matter who controls the budget, we need to align all stakeholders.

Yes you need budget, but even more than that, you need alignment. Let's say the budget lives with Enablement. Does that mean Enablement can run this project independently and ensure success?

No.

What if the budget lives with Revenue Operations?

Also no.

What if your company has one of these fancy new titles like, "Director of Revenue Enablement, Strategy and Operations," and what if all revenue support functions report there?

Still no.

At a recent gathering of the Winning by Design Customer Advisory Board, the consensus opinion was clear:

Leadership alignment is required both when choosing a GTM methodology and especially when implementing. The group specifically called out alignment across 3 levels of leadership:

1. Executive Leadership (C-level)
2. Sales Leadership (VP-level)
3. Front-line management

Involve enough of your leadership in the methodology selection to send the signal that this is non-optional.

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*“I feel like we underestimate executives in this. Your executives are who make it ‘promotable work.’ They say, ‘this is our way.’ They make it a matter of company pride to follow global standards.”*

*- Ashton Williams, Slack*

## **PART TWO:**

# **HOW TO ENSURE YOUR METHODOLOGY STICKS**

Higher adoption leads to better results.

But higher adoption is a function of the activation plan. So what is your activation plan?

If you plan to simply roll out your new methodology in waves of training across your organization – accompanied by certification – it likely does not matter what methodology you choose.

Why?

Because it won't stick.

The best reps will pay attention, remember what they were taught, and make permanent adjustments to their approach that incorporate the parts of the new methodology that resonate.

Middle-of-the-pack reps will forget soon.

And your lowest performers will look to get the checkmark of having participated in training, then go back to what they were doing.

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***Training alone does not work, it does not stick, and it does not affect change in a way that is transformational.***

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### **Design**

1. Leadership Alignment
2. Impact Metrics & Leading Indicators
3. Baselineing

### **Activate**

4. Speed Team / Pilot Team
5. "Pull" Marketing
6. Phased Rollout: Impact Sprints

### **Operate**

7. Ongoing Measurement
8. Culture of Coaching
9. Operationalized Enablement

## Design 1. Leadership Alignment

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*“If you don't have the senior leaders who actually go through the training and are willing to inspect using the language of that methodology, it will fail every time.”*

*- Chuck Marcouiller, Freightwaves*

An investment in a GTM Methodology is expensive. Investing in a GTM Operating Model is even more so.

And the most expensive investment you make is not measured in money – it's measured in time and attention.

One thing is sure: if you roll out a new methodology across your teams, they will invest hundreds or thousands of hours in classrooms, workshops, and roleplays.

Now the question is whether that will make any difference?

One way to ensure failure is to not have alignment and support from leadership.

If a rep walks out of training where they learned X and into a review with their manager where she hears Y, what do you think she will do? Y. Every time.

Our Customer Advisory Board feels that Leadership Alignment is so critically important, they are willing to stop a project until alignment can be secured.

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*“We did a go-to-market analysis that included a lot of input from reps and teams and front-line managers. But as we began to define the process, we took it out of committee and put the onus on the senior sales leadership team. Through this process they became accountable, and now they're bought into what we're rolling out, which to me is really key.”*

*- Stacey Justice, HashiCorp*

## Design 2. Impact Metrics & Leading Indicators

If we are to see results from the roll out of a GTM methodology, leaders must align on goals.

Ideally we would pick an initial metric to focus on. For example, the goal of the initial methodology roll-out could be to increase rep productivity by increasing the close rate or by decreasing the discount rate.

*Note: It doesn't matter as much which metric you pick as long as you focus on one or two at most per team. If you're trying to master tennis, you cannot improve your serve, forehand, backhand, and smash - or your swing, grip, and stance all at the same time. Aim small, miss small.*

We call these targeted outcomes you are trying

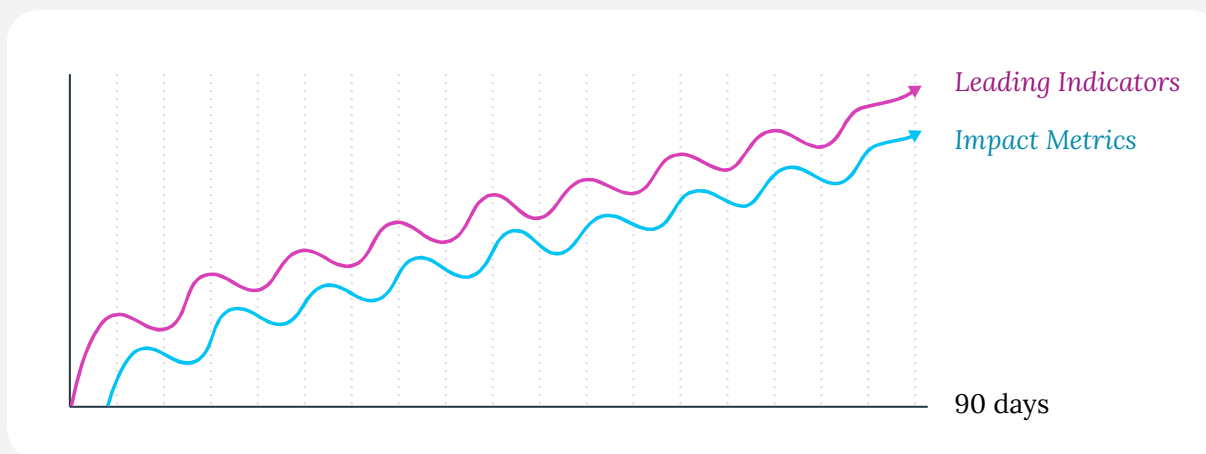
to improve "Impact Metrics." Some good examples of GTM Impact Metrics would be:

- Improve discount rate
- Improve qualification by raising conversion rate from MQL to SQL (CR3)

Impact Metrics are targeted enough to isolate and measure, but with sales cycles being what they are, improvements in Impact Metrics may not be visible for weeks or months. What improvements can we see sooner?

Leading Indicators correlate with Impact Metrics, but they are easier and faster to measure and improve.

Ideally we want to see Leading Indicators improve from day-to-day and week-to-week. At a minimum within 90 days we should see improvements in Leading Indicators, which—if we chose them correctly—will directly correlate with Impact Metrics.



Whether you adopt standard definitions provided by Winning by Design or create your own, step one is to choose the metrics you want to impact, define them, and write down the definitions.



## Design 3. Baseline

Now that you have defined your Impact Metrics and Leading Indicators, it's time to baseline.

Baselining is best done on a trailing 90-day basis, team by team.

For volume metrics, you will want to normalize output on a per-rep-period basis to account for

growing or shrinking teams and for fewer or more effective work days in any given period.

For rate-based metrics (%), no such normalization is required – as long as the definition remains consistent, you can compare across periods within the same motion, regardless of fluctuations in team composition.

## Activate 4. Speed Team

As soon as is practical, name a pilot team (we call it a Speed Team) to be the first to adopt the Methodology and post results; this pays huge dividends.

A Speed Team is one manager and 6-10 reps, all running a single motion in a single segment.

The Speed Team will admittedly be stepping out in front of the rest of the teams – perhaps even before processes (Playbooks) are fully designed.

This is not a problem.

Why? Because we choose a Speed Team based

on the robustness of the manager and the team members. The ideal Speed Team is not afraid of new things, and their challenge is threefold:

1. **Iron out the kinks:** find ways to improve and perfect the application of the methodology to your specific market and customers
2. **Show what good looks like:** post metrics that exceed baseline and set a bar for the rest of the company
3. **Establish themselves as experts:** become a resource for the rest of the team who comes after

## Activate 5. “Pull” Marketing

Early results from a Speed Team are always good. Always.

Really?

Yes. Because a) we chose the right team with the right manager, b) we challenged them, and c) we gave them excellent resources to adopt and apply the Methodology.

As good metrics begin accumulating, we publicize the experience and results of the Speed Team to other teams awaiting the

Methodology. Speed Team members become a sounding board and coaching resource for teams who subsequently onboard to the new methodology. And whereas the baseline is the “thing to beat,” the fact that the Speed Team is already beating the baseline becomes all the more motivating for subsequent teams.

This is called “Pull” marketing as opposed to traditional “Push” rollouts, because in this environment, teams look forward to receiving the goodness their predecessors already got.

## Activate

## 6. Phased Rollout: Impact Sprints

At this point we have:

- Leadership Alignment
- Metrics Definitions
- Baseline performance
- Speed Team results (what good looks like)
- Teams waiting to adopt

With all that in place, what could possibly go wrong?

You'd be surprised.

Don't blow this.

***“An amateur practices until they get it right; a professional practices until they can't get it wrong.”***

If you've executed well to this point, you have

anxious / eager reps, front-line managers, and leadership all calling out to speed things up.

***“What's stopping us from just rolling out the whole methodology? We have it designed, right? Just train the crew and let the managers handle the reinforcement.”***

That's the right idea, but no. Managers do need to handle the reinforcement (more on that in the next section). But the question is – how much can reasonably be understood, practiced, inspected, improved, and measured at once?

Answer: you know the answer.

Humans are humans, and we learn how we learn. Kandji handled this problem by breaking down their transformation into chunks.

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*“We broke our Playbook into monthly chunks that we use for ongoing enablement for existing reps. We train fundamental skills on Thursdays and do rolling certifications. Managers are informed who opts in, the skills are reinforced by sales management in a ‘Study Hall’ on Fridays, and then reinforced in their team meetings on Tuesdays.”*

- Sonja Damerval, Kandji

At Clari, they felt instinctively that although they need a complete methodology, they want to deliver these skills to their reps in digestible pieces:

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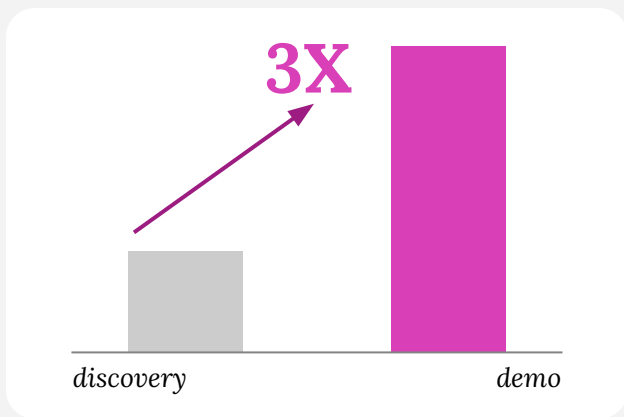
*“There are specific things we want to enhance from a skill standpoint. We want to focus on discovery. We want to focus on negotiating. We want to bring more value into all of our deals. And we really appreciated that we could diagnose specific pain points for ourselves and bring in someone to help address those things.”*

- Sarah Houlihan, Clari

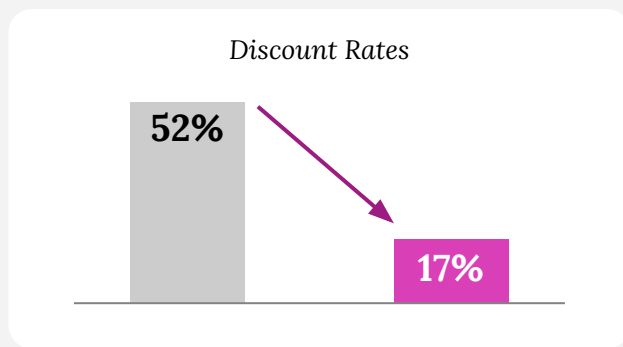
## Activate 6. Phased Rollout: Impact Sprints - Continued

Freightwaves has been taking one Impact Metric at a time, starting with the worst-performing parts of their selling process, based on rep conversion data compared with industry standards.

First they took on discovery. By introducing a best-in-class methodology around discovering Situation, Pain and Impact, Freightwaves tripled conversion rates from discovery to demo.



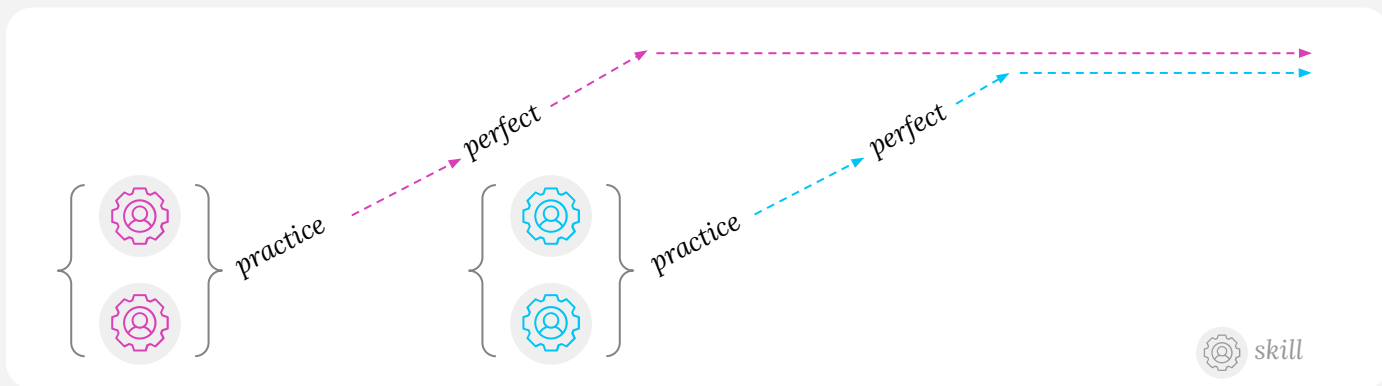
Next they took on discounting – swapping out the historical practice of “discounting to get the deal” for “trading something of value.” The overall discount rate fell significantly, with one of their strongest performing reps lowering average discount from 52% to 17%.



Across example after example of successful transformations, we have seen the pattern of designing big, rolling out small. Establish the Operating Model, train two skills at a time.

Having studied these patterns of success, Winning by Design has developed a system of phased rollout based on what we call an “Impact Sprint.”

An Impact Sprint is a focused effort on one or two skills with associated Impact Metrics and Leading Indicators. It involves teaching, demonstrating, practicing, role-playing, and ongoing measurement and coaching.



## Operate 7. Ongoing Measurement (Impact Office)

For a new methodology to create lasting change, ongoing measurement of the Impact Metrics and Leading Indicators is required.

Ideally, each manager knows her team's metrics, manages to them, and coaches to them – leveraging the system she inherited.

But the effort is not only about measurement and reporting – it is also about triaging things that surface as “out of tolerance.” Much like the manufacturing system of Six Sigma, this effort is a way to spot what is not working as expected, and aim attention and effort there, to bring the revenue factory back up to full potential.

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*“Understanding both the adoption of a GTM Methodology and its impact on the business is critical. One way to achieve this is to instrument and measure the “completeness” of SPICED fields in your CRM. By correlating these metrics with both win rate and deal size, you can gain valuable insights on the correlation of methodology adoption and business impact.”*

*- Ian Westbrook, DocuSign*

- Talkwalker has implemented SPICED in Salesforce, in all internal and external case studies, throughout Gong using trackers, and in all internal win announcements.
- Freightwaves measurements lift each time they focus on an Impact Metric. As these metrics improve, they measure the resulting compound impact on growth.
- HashiCorp maintains a Productivity Council for revenue, where all improvements in Impact Metrics are reported. In terms of Leading Indicators, HashiCorp is also working with Gong on a SPICED integration that will not only score calls based on the methodology, but also insert evidence of SPICED into Salesforce.

Ongoing measurement requires metrics to be codified in systems and summarized on an ongoing basis. We call this approach an Impact Office, and our recommended minimum frequency for executives to engage with the Impact Metrics is quarterly.

## Operate 8. Culture of Coaching

The key to any change program is front-line managers.

The managers must believe.

They must know the Methodology better than the reps.

They must be willing to dive into deal reviews, process inspection, and skills assessment, using the language and structure of the Methodology.

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*“Our focus has been entirely on our frontline managers. The objective is to operationalize and make sure this effort is really sticky.”*

- Gail Behun, JuniperSquare

Managers must be able to inspect, coach, and inspire – all the while reinforcing the chosen Methodology and metrics. They must be able to diagnose issues by assessing an individual’s Results, determining whether the rep is lacking in Effort, Knowledge, or Skill, and then have the coaching tools to work with the rep to improve.

Reps don’t need managers. They need coaches.

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*“Most of our reps have been trained and understand all the bits and pieces. But now they need coaching. We are now focusing all our efforts on leadership alignment to establish a coaching culture.”*

- Jill Guardia, Thought Industries

## Operate 9. Operationalized Enablement

Not every rep will remember and implement the elements of your new GTM Methodology. In fact, most will forget the majority of the training once it is over.

Coaching is one solution, but it is not foolproof.

So how does this become more foolproof? Operationalization.

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*“Creating an ecosystem where the GTM Methodology is fully and accurately represented in all aspects of the sellers ecosystem is key. For example, ensuring all relevant Enablement content, sales tech stack experiences and performance management reports align to the core principles of the GTM Methodology helps ensure/reinforce adoption. By taking meaningful steps in this area, all sellers, managers, enablers and operators are effectively “living and breathing” the methodology in what they see, hear and leverage on a daily basis.”*

- Ian Westbrook, DocuSign

## Operate 9. Operationalized Enablement - Continued

Some options for operationalization follow:

- **Standardization:** As mentioned above, DocuSign and Talkwalker have both implemented SPICED as a standard set of fields in Salesforce, allowing for a consistent way of inspecting and measuring rep compliance with the methodology and overall deal health
- **Automation:** Many technology companies have incorporated SPICED and the Winning by Design Bowtie into their platforms in such a way that it is “automatic” to follow the methodology with this enabled:
  - **Winn.ai** prompts reps during discovery calls with suggested SPICED questions, then listens to the call, automatically picks out SPICED language, and populates the language into configured Salesforce fields on the opportunity
  - **Gong** has released a beta version of “trackers,” configured to SPICED, whereby it can listen for and log indicators of SPICED into Salesforce automatically
  - **Catalyst** has implemented the Bowtie into its standard system for managing customer engagement post-initial sale
  - **BenchSights** has standardized on the Bowtie as its data model for benchmarking GTM motions across the industry
- **Mandate:** Some companies mandate the completion of SPICED fields for an opportunity to progress through the funnel:
  - **Slack** has standardized all deal reviews to include aspects of the SPICED methodology. This makes deals inspectable and measurable consistently across teams.
  - **Thought Industries** has also standardized all deal reviews using the SPICED methodology, making inspection and measurement easy.
- **Just-in-time Enablement:** The concept of just-in-time help / enablement is becoming more popular
  - **Rattle** has deployed in-app guidance within their CRM. This surfaces the right resources at the right time, depending on triggers within CRM. For instance, if a \$six-figure deal enters the proposal stage, the rep is presented with a video on “Trade vs. Negotiation” to remind them of the skill that is relevant

These approaches bring the contents of the methodology right to the point of decision / action, so reps are not required to a) remember or b) look up the relevant skills as they are needed as they work with their customers.

We believe operationalization will become more and more popular as Methodologies become more and more embedded into how GTM teams operate.

***Do we really need an approach this comprehensive?***

***No... only if you want results, and only if you want them to stick.***

***It's like Mom used to say: “Only brush the teeth you want to keep.”***

## SUMMARY

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“If you don’t know where you’re going, any road will get you there.”

- Lewis Carroll

In today’s environment of sustainable growth, it is important to architect your growth *by design*.

Each piece of the revenue factory produces important inputs for the next piece, and marginal gains across the entire process can compound to produce impressive – even transformational – results.

Not all methodologies are as ambitious as to take on the problem of growth.

Not all methodologies are built to fit within a Revenue Operating Model.

Rolling out a holistic GTM Methodology (or Operating Model) is ambitious, but remember:

1. Training on “any” methodology will get you consistency and certified personnel, but it may not get you *results*.
2. Hit-and-run training will produce impact that is momentary at best.
3. Choosing a sales methodology (versus a full GTM Methodology) may improve the Sales portion of the revenue machine, but it may create disconnect with the Customer Success portion.

Collectively, we believe in the Revenue Architecture approach to transformation. We believe a Revenue Operating Model, a defined set of processes, an agreed-upon set of metrics, ongoing measurement and tuning, and a culture of coaching are a responsible way of approaching a transformation.

Conversely, we believe hit-and-run approaches to training get you checks-in-the-boxes, but no lasting change.

It is our experience this can be done. Growth can be architected and managed according to that architecture.

**Go, fight, win!**

- Dave, Dominique, and the entire WbD Customer Advisory Board

