



How to Make a GTM Methodology Stick, At Scale

JULY 2023



Dave Boyce
Head of Consulting



Ian Westbrook
Sr. Director, GTM Process Strategy & Design



DocuSign



Rolling out a Methodology is a Human Effort

Commitment is a function of Momentum

It only works if people believe

You can accomplish one stage at a time

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

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

GTM Methodology

Defines how a GTM team member behaves: contextual awareness, skills, process.

GTM Operating Model

Defines the parameters of the GTM system: process, stages, data model, metrics.

PRESENTERS



Dave Boyce
Head of Consulting



Ian Westbrook
Sr. Director, GTM Process Strategy & Design



00

Meta-stages of Methodology Rollout

01 Design

02 Activate

03 Operate

01

Design

- Leadership Alignment
- Impact Metrics & Leading Indicators
- Baselining

Leadership Alignment

If you're not working on what Leadership cares about, what are you even doing?

“

We can't design our way to greatness

- Dave

Situation

How does leadership describe the current situation?

Pain

How would leadership describe the pain?

Impact

What is leadership's view on potential impact? (see measurement)

Critical Event

What critical event is leadership tracking?

Decision

How will leadership make decisions about this effort?

Leadership Alignment

The investment in a GTM Methodology is expensive - measured in the time and attention of your team: hundreds or thousands of hours in classrooms, workshops, and roleplays.

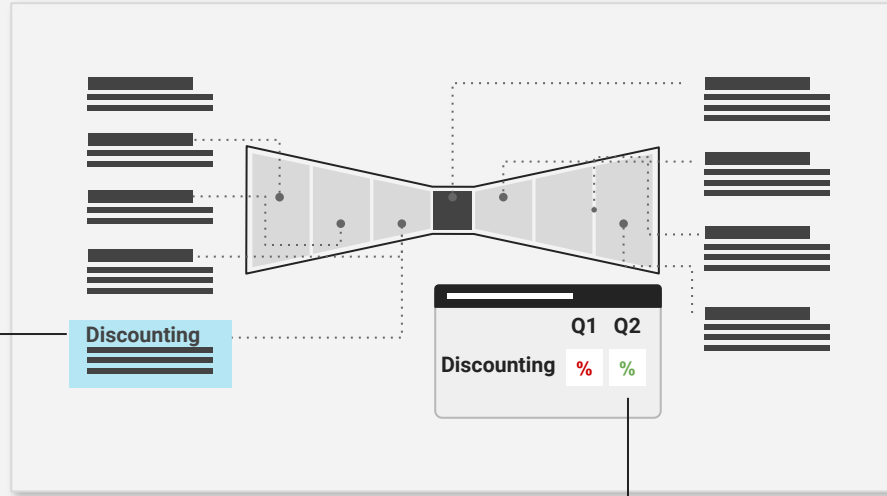
Have the courage to pump the brakes on a project until alignment from leadership can be secured.

Leadership Alignment - Impact Metrics & Leading Indicators

2

Identify your **leading indicators** - these correlate with Impact Metrics, but they are easier and faster to measure and improve.

These will show improvement on a daily / weekly basis



1

Select your impact metrics - examples: Improve the discount rate

These will show improvement on a monthly / quarterly basis

Leadership Alignment - Baselineing

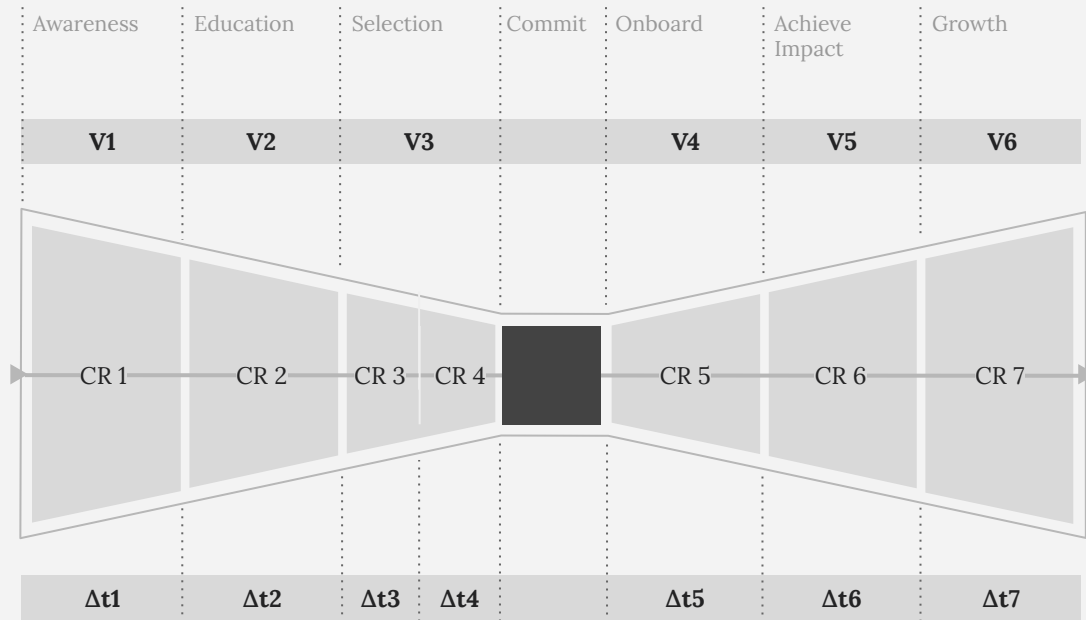
*Best done on a trailing 90-day basis,
team by team*

For Volume Metrics:

*normalize output on a
per-rep-period basis*

For Rate-Based Metrics:

no need to normalize



02

Activate

- Speed Team / Pilot Team
- “Pull” Marketing
- Phased Rollout with Impact Sprints

Speed Team / Pilot Team

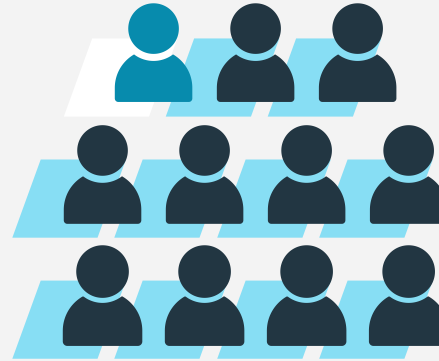
Name a pilot team ("Speed Team") to be the first to adopt the Methodology and post results

Their challenge:

- Iron out the kinks - find ways to improve how the methodology is applied
- Show what good looks like - post metrics that exceed baseline
- Establish themselves as experts - become a resource for the rest of the team who comes after

Speed Team Makeup

All running a single motion
in a single segment



Courage.

1 **MANAGER**

6-10 **REPS**

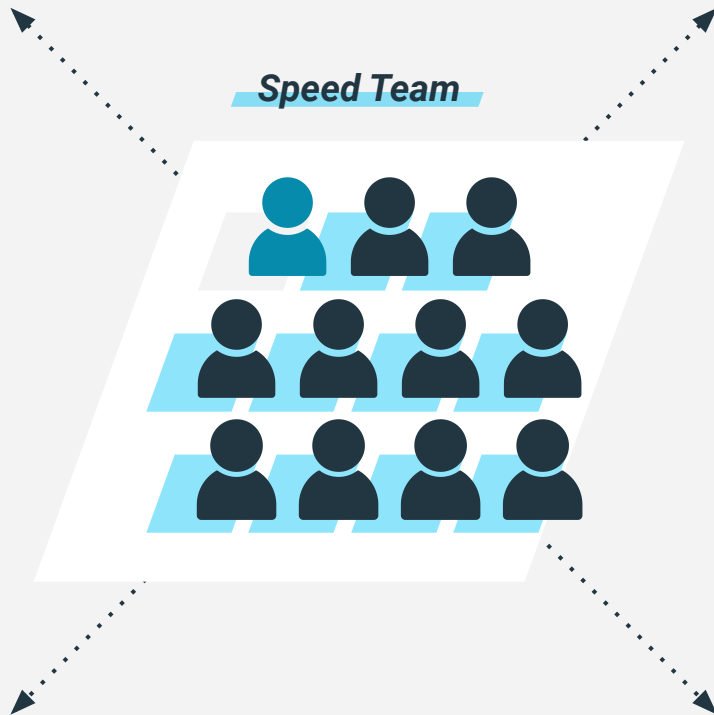
“Pull” Marketing

Use the successes of the Speed Team to engage the rest of the team!

You gave your Speed Team new resources and tools

If you do this right, they will start to post good results on their Impact Metrics

The rest of the team will look forward to receiving the goodness that the Speed Team already has received



When you're doing this at scale...

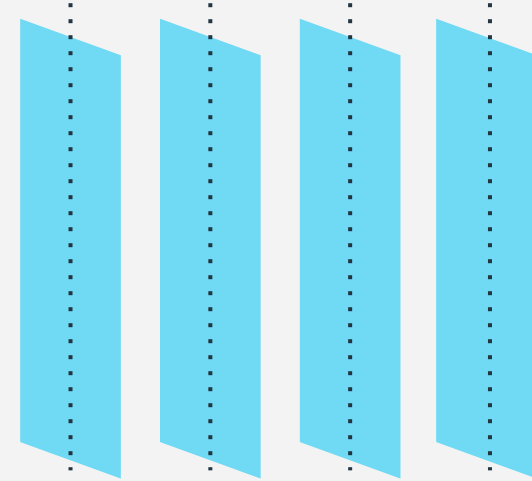
Geographies

Team Structures

Product Lines

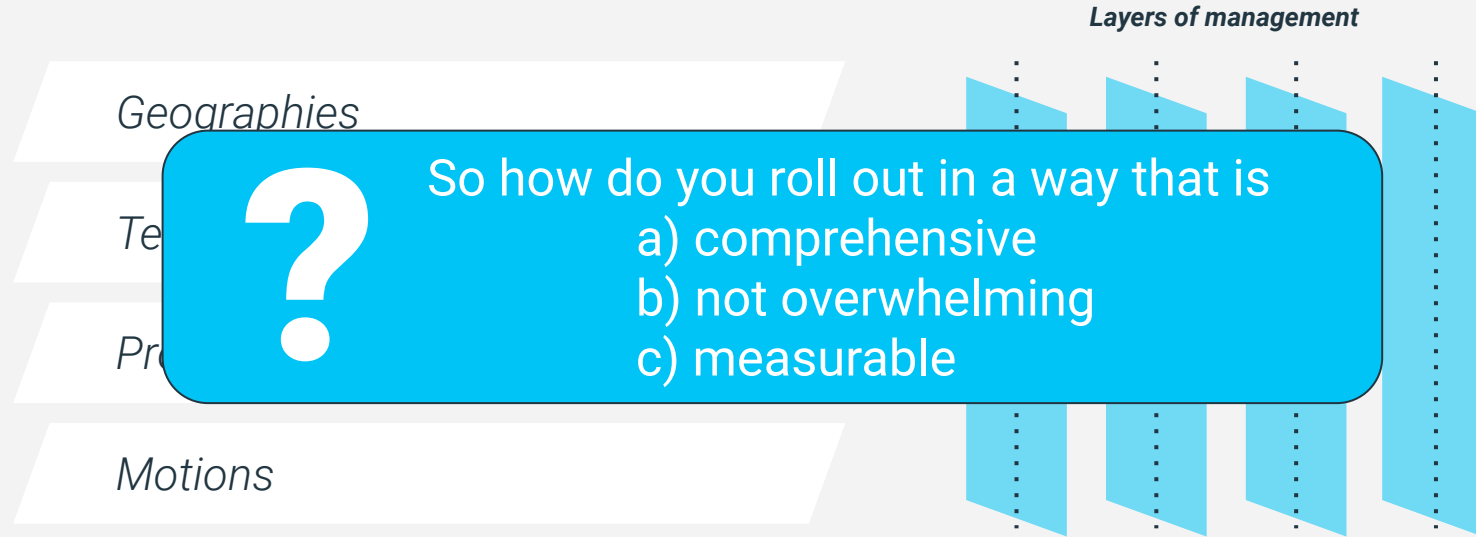
Motions

Layers of management



A scaled, complex org cannot absorb all the change at once.

When you're doing this at scale...



A scaled, complex org cannot absorb all the change at once.

Phased Rollout

*"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."
(don't do this)*

Instead, deliver the skills to your team in digestible pieces

IDEAS:

Monthly chunks

"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

Specific target skills

"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

What is Victory?

Impact on one specific thing that matters.

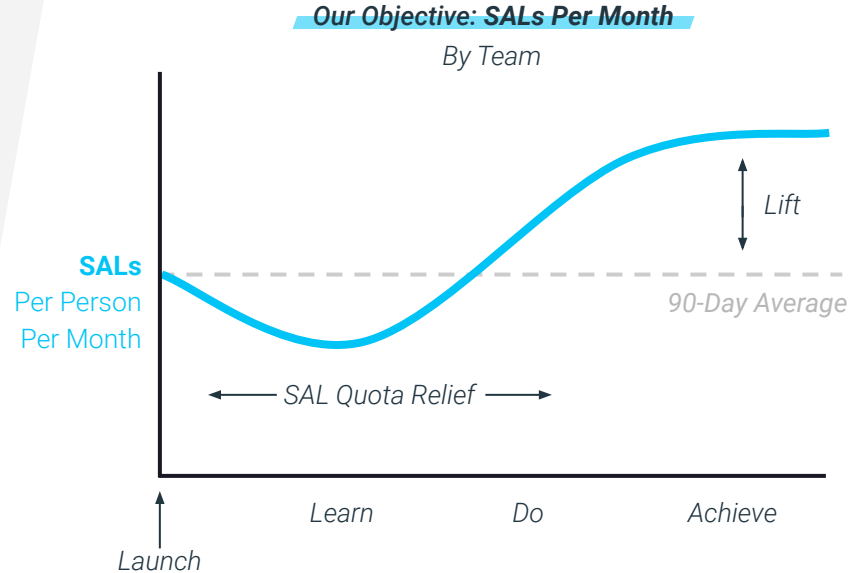
Example: Storytelling

Focus: Discovery calls

Measurement: Gong trackers, picking up the phrase "That reminds me of a time when..."

Result: Increase CR3 %

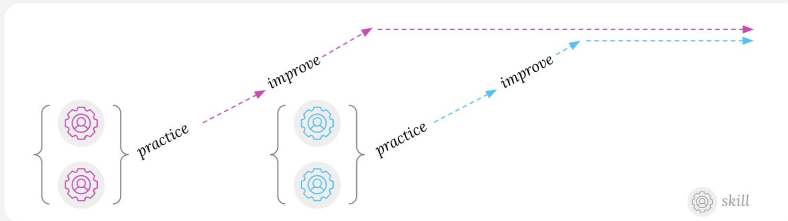
Nail that, and then identify the next metric...



Phased Rollout with Impact Sprints

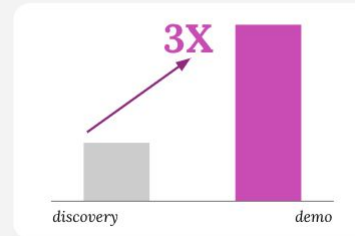
“Impact Sprints”

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.



FREIGHTWAVES®

First, they took on discovery. By introducing a best-in-class methodology around discovering Situation, Pain, and Impact, Freightwaves tripled conversation 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%.



03

Operate

- Ongoing Measurement
- Culture of Coaching
- Operationalized Enablement

What could ongoing measurement look like

Do you have a “cockpit of GTM measurement”

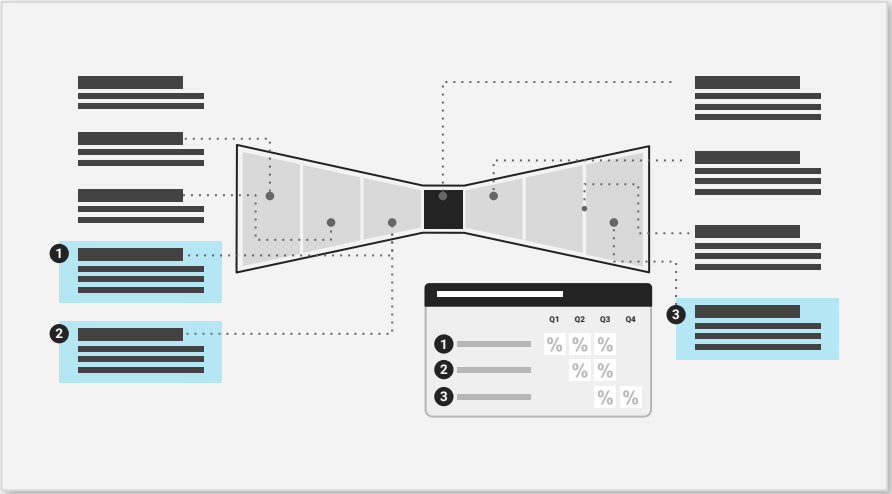
. . . that centralizes measurement, priority setting, and leadership alignment

. . . that surfaces new opportunities as you roll out the program

. . . that acts as a voice for changes that need to be made

. . . that is accountable for achieving the desired impact

. . . that ensures you have executive alignment the ENTIRE way through



Here's what that could look like...

01

Quarterly Reporting with key insights on performance

02

Executive workshop covering results and impact recommendations

03

Approved alignment on your 30-60-90 day continuous improvement plan

How to prioritize and measure each quarter

EXAMPLE

Aligned Methodology

- Only 10% of reps completing SPICED

Lead Volume

- Lead volume is sufficient
- 50% of leads not in ICP

Prospecting Conversion

- Lead to conversion rate is 20% below SaaS benchmarks

1

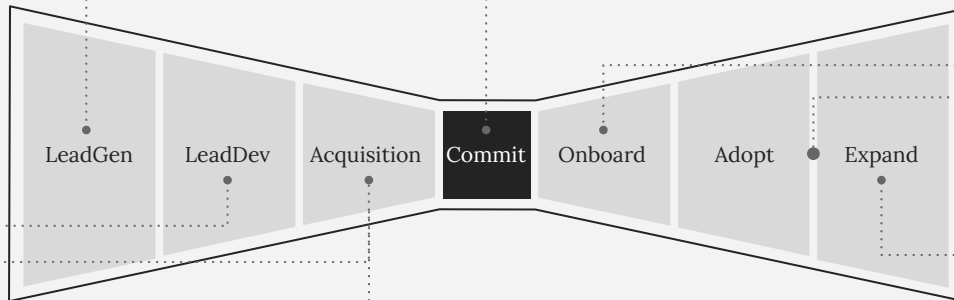
Sales Close Rate

- Lack of account planning
- 2 stakeholders on average in deal conversations/Avg for your ACV size is 7

2

Discounting

- Discounting rate 15% over industry average
- Discounting up 5% Q/Q
- Heaviest in East Coast



AE Hand Off

- Hand off process varies by team and impacts time to value
- Average time 2 weeks

Onboarding

- Senior leaders not informed or consulted in initial delivery

Inconsistent QBR

- QBRs only occurring 50% of the time

2

No Feedback loop from CS to Exp opps

- Expansion Plays
- Trigger Plays

Prioritized Sprints

	Q1	Q2	Q3	Q4
1 Sales Close Rate	22%	24%	25%	
2 Discounting		10%	8%	
3 Expansion Rate			82%	93%

Ongoing Measurement

*WbD uses an approach with our clients called an **Impact Office**, with quarterly executive reports and metrics codified into GTM systems*

Lasting Change

To create lasting change, you must measure over time

Metrics as the North Star

Each manager should know her team's metrics, manages to them, and coach to them

Culture of Coaching

The managers must...

Be able to inspect | ***Be able to coach*** | ***Be able to inspire*** | ***Believe***

“

“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

“

“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

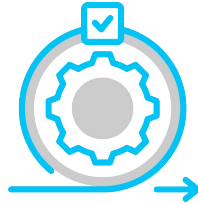
Operationalized Enablement

People need repetition in order to learn and internalize, in order to combat the Forgetting Curve.

How to solve for this? Operationalize it!



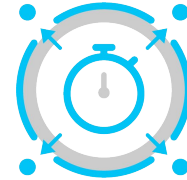
Standardization



Automation



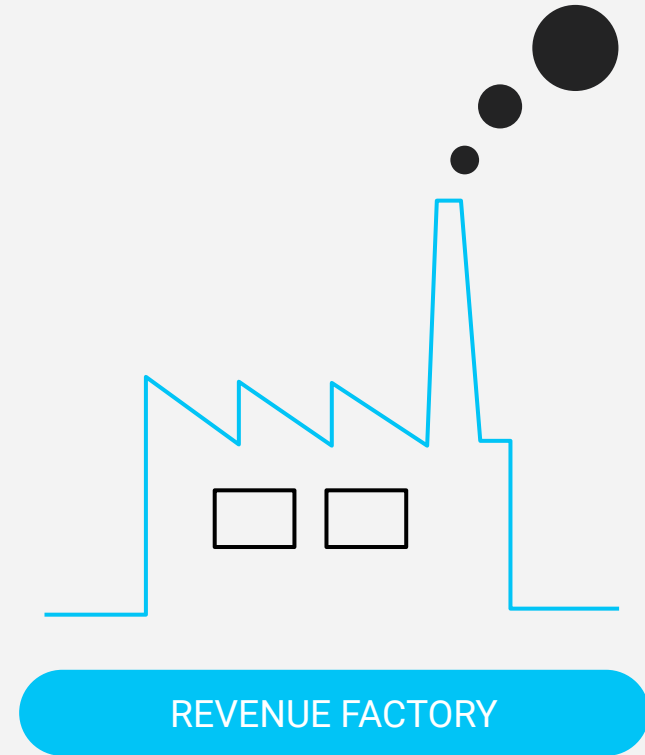
Mandate



Just-in-Time Enablement

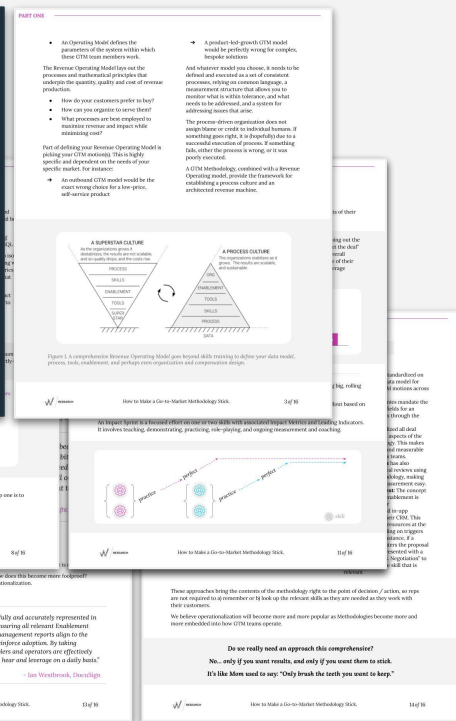
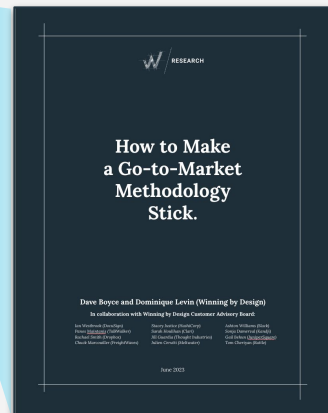
Some final thoughts* *to keep in mind

- Rolling out a Methodology is a Human Effort
- Commitment is a function of Momentum
- It only works if people believe
- You can accomplish one stage at a time



Access the complete guidance & research

www.winningbydesign.com/resources/research



Get more content like this

The best ways to continue to get the latest insights from WbD

01

Sign up for the WbD Research Newsletter

www.winningbydesign.com/newsletter

Get the latest research and insights on how to optimize your GTM and grow your revenue

02

Stay smart while scrolling LinkedIn



Follow founder Jacco van der Kooij



Follow WbD on LinkedIn

03

Check out WbD Events & Workshops

<https://winningbydesign.com/events-workshops-webinars/>

Additional open workshops available every week



&

