MARKETBRIDGE

EXECUTIVE WHITEPAPER

A Roadmap for Modern B2B Go-to-Market®

Part 1: Growth Design

An essential guide on what it takes to find and maintain predictable revenue growth

Written by

Andy Hasselwander, *Chief Analytics Officer, MarketBridge*
Jeff Ledwick, *Senior Director, Go-to-Market Strategy, MarketBridge*
Steven Lewis, *Senior Vice President, Go-to-Market Strategy, MarketBridge*
Ed Thome, *Director, Go-to-Market Strategy, MarketBridge*

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A COMPREHENSIVE RESOURCE ON

Building Stable, Predictable Revenue Growth

As technology continues to accelerate—with breakthrough innovations coming more and more frequently—it can be difficult for executives to maintain their composure. However, amidst all this dynamism, it is growth that ultimately solves all problems. Leaders who can quickly and reliably build a stable, predictable revenue stream—one which mitigates seasonal fluctuations, macroeconomic factors, competitive actions, and technology disruption—will ultimately win out over those who focus solely on product innovation. These robust revenue streams are not accidental; they are manufactured with deliberate care. Collectively, this discipline is called go-to-market strategy. Its scope is broad and yet concrete: Go-to-market activities include all the revenue motions—marketing, sales, and customer service—that connect businesses with customers.

In this paper—the first in a series of three on B2B go-to-market—we dive into what it takes for businesses to find and maintain predictable growth. These recommendations are based on our firm's 30 years of experience—spanning thousands of client engagements—In helping enterprises with complex purchase cycles, designing, diagnosing, and retooling their go-to-market strategies. We examine both the common mistakes executives make when building their go-to-market strategies, and the winning formula from today's high-growth B2B businesses. This essential guide is for executives seeking to develop a modern, sustainable, and repeatable go-to-market strategy.

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Go-to-Market Strategy

Definition

Academically, marketing's scope is defined as all the customer-facing activities of an enterprise. However, inside most enterprises, "marketing " is shorthand for one-to-many execution of tactics through promotional channels like television, events, radio (upper funnel), and digital, direct mail, email, and search (lower funnel.) "Sales", on the other hand, usually means the bottom of the funnel: Taking a prospect from "lead" to "customer." In practical terms, "Sales" usually means that there are human beings involved in closing a deal—either employees (direct sales) or partners (agents, brokers, value-added resellers, or managed service providers.). The reality is that for most B2B organizations, these distinctions are blurring, with sales supporting demand efforts and marketing increasingly supporting revenue motions down-funnel and post-purchase.

The term "go-to-market" probably arose in the early-stage venture technology community; in Silicon Valley lingo, go-to-market dollars are the funds required to take a product or a service to customers. At MarketBridge, we use the term go-to-market the same way academics use the term marketing: all the customer-facing functions of an enterprise. "Go-to-Market" is also used more in business-to-business (B2B) organizations, or in organizations with a more complex product (and thus a more complicated buying cycle.) MarketBridge started helping large technology companies design their go-to-market strategies in the early 1990s, when channels were moving from primarily face-to-face to partner (value-added resellers) and e-commerce. Our scope has since expanded to cover pretty much any industry selling complex products into complex buying situations.

A go-to-market (GTM) strategy is a plan that details how an organization expects to engage with customers to convince them to buy their product or service and to gain a competitive advantage. A go-to-market strategy includes in its scope customer segmentation and targeting; positioning; product pricing; marketing mix; sales channels and routes-to-market; and customer engagement, retention, and upsell.

History

Until the industrial revolution of the mid-1800s, most selling was done person-to-person. People exchanged goods in marketplaces or sold their wares door-to-door. Personal relationships were critical, and everyone was, to some extent, both a seller and a buyer.

Once corporations started making lots of things to scale, this changed. It was no longer possible to conduct business individually. Distribution became an imperative. For corporations selling their wares to consumers, retail was born. In this model, goods were sold to smaller companies that would aggregate those goods and resell them at a markup. Consumers didn't have to travel to the Ford or the Levi Strauss factory; instead, they could buy these goods locally, with "value-added" services like returns, tailoring, service, and assortments of other goods.

However, the corporations making these consumer items also needed equipment and materials to manufacture those items--and other corporations quickly popped up to provide them. Machines, ore, chemicals, parts, and fabric needed to be purchased in large amounts, using complex payment vehicles. The sales representative became the human aid guiding the complex business-to-business sales cycle. Sales representatives became highly skilled, highly paid agents for corporations, forming long-lasting relationships with buyers, procurement offices, and accounts payable.

The business-to-business sales force has evolved over the past century, slowly at first, and more quickly in recent decades. Direct sales have been largely supplanted by value-added resellers and dealers for selling to small- and mid-sized businesses (SMBs). Ecommerce—selling items over a web interface that are usually delivered by mail—eliminated the need for human sales reps for a vast number of items. As more mundane tasks became automated, sales reps upskilled, becoming more consultative and technical, particularly in complex industries. However, the single biggest change to B2B selling has been, not surprisingly, technology—making things possible in B2B go-to-market that weren't conceivable even a decade ago.

Modern B2B Go-to-Market

The impacts of technology on B2B go-to-market have been widespread, affecting everything from channels to buyer preferences to marketplaces to productivity tools. Technology has increased both the productivity of marketing and sales teams, and the complexity of mastering B2B go-to-market strategies.

Data

Almost everything is now counted and stored about the marketing and sales process. It's also much easier to get at the data, as tools for querying and analysis have become ubiquitous. The data structure for tracking go-to-market is fairly simple at its core. There are three main "tables" or "objects" sitting at the core of tracking systems—called *CRM (Customer Relationship Management)* systems:

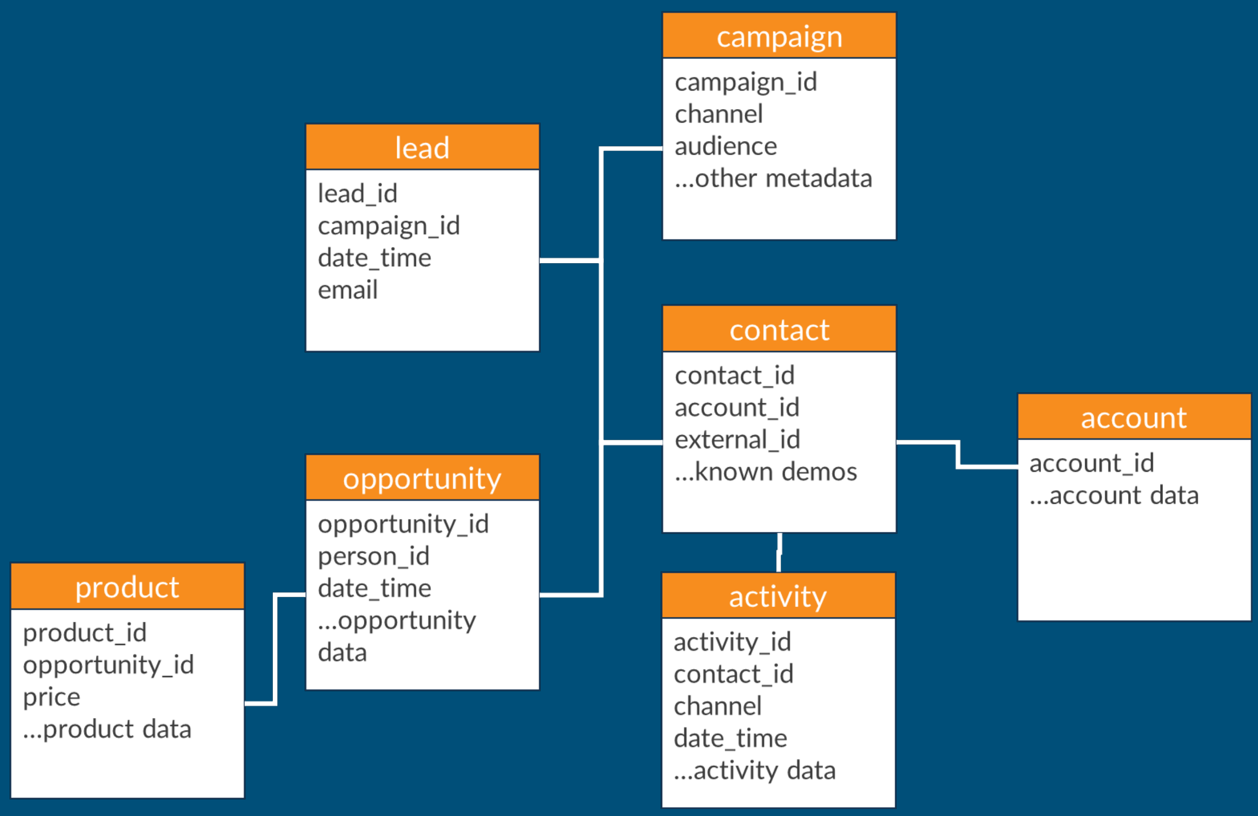
- Accounts and the Contacts within them are the lifeblood of a go-to-market organization; this "house database" helps marketers and sellers prioritize their outreach, and is generally the skeleton upon which other data hang.
- Activities—from upstream marketing touches (emails, paid search queries) to downstream sales meetings—help understand what works and what doesn't. Digital marketing has made the volume

of activities that are trackable explode. This “data exhaust” can enable—at least theoretically—scientific, integrated motions to drive sales at the individual contact level in an account. This is sometimes called Account-Based Marketing.

- Finally, the deals themselves, stored in **Lead and Opportunity** objects, represent the business objectives of the go-to-market organization. Managing the lead and opportunity flow is called pipeline management. Managing and forecasting the pipeline via data is a critical and sometimes very difficult task for sales management.

In an ideal organization, data of this type from across multiple different systems end up in one place for measurement and analysis, sometimes called a data warehouse or data lake. However, for all the promise of cheap, abundant data, in many organizations, B2B go-to-market data remains siloed, poorly maintained, and outdated.

Figure 1: A simplified CRM data structure allows go-to-market organizations to understand accounts, people in those accounts, opportunities, and leads from previously unknown accounts.



Shifting Buyer Preferences

B2B go-to-market has come a long way from the era when every "pitch" meeting was face-to-face. Even through the early 2000s, being a highly paid, blue suit salesperson meant logging a lot of miles—whether by car in a local territory, or by air for regionally- and nationally-focused reps.

This started changing in the 1990s, as inside sales or "telecoverage" became a more important part of sales organizations. These lower-cost, more junior selling and account management teams spent the day on the phone, using CRM systems to prospect for business and "cover" the existing account base, attempting to up- and cross-sell. These roles were very effective in driving the upper part of the funnel—the leads that could be eventually closed by more expensive, face-to-face reps. Eventually, inside sales reps (also sometimes called business development managers, or BDMs) started using email as their primary mode of communication.

The shift to inside sales for smaller accounts lowered go-to-market expenses, which in turn increased the profitability of companies that embraced new innovative go-to-market models. However, channel design has recently become even more complicated, as subscription business models have exploded. In a subscription model, large up-front purchases have been replaced by ongoing per employee, per month fees. This has shifted the emphasis to customer experience (CX), as free trials typically get users hooked—and go-to-market motions increasingly focus on the conversion to "paid" account tiers.

However, the increasing reliance on tele- and email-based account management, free trials, and automated motions have had a long-run unintended consequence. More and more buyers no longer want to see a real human in their office. Technology has allowed buyers to turn the tables, searching for what they need when they need it, without the headaches of long meetings and quid pro quo relationships.

Today, the cold, outbound touch is increasingly ignored, as the cost to communicate has approached zero. Unsolicited email—the primary tool of inside sellers for two decades—has become worse than direct mail in terms of breakthrough. Buyers now want to be serviced with information when they want it—and the job of the B2B go-to-market organization has shifted to a much more empathetic, value-when-you-need-it model.

Like it or not, the web browser (whether desktop or mobile) is the modern medium for B2B go-to-market interactions. Display, streaming video, business-specific value-add sites (like Stack Overflow for developers and Bloomberg for financial executives), LinkedIn, and Google are the landscapes that companies must understand and master to meet buyers where they expect information. This requires that go-to-market organizations think like a buyer, understanding the digital motions that likely customers make during their day when working on their laptop, and at home when they are leaning back scrolling through Instagram. There is still absolutely room for high-value, human sellers—but the 2020s version is an expert, digitally-native, empathetic communicator who is there when you need her.

B2B Marketplaces

As buyers have shifted to be more self-reliant and less tolerant of intrusive tactics, marketplaces have grown up online to match sellers with buyers. These marketplaces range from truly collaborative to more one-way. Software providers like Salesforce.com provide a marketplace for other software companies that integrate with the base software. HR portals like Bamboo HR provide marketplaces for payroll and employee benefits companies—and vice versa. At MarketBridge, we call these models—where the B2B transaction happens on software—“platform as a channel.” B2B marketplaces typically have four main features:

- **Search and Information**: Product catalogs and search functionality that allow buyers to easily browse and compare offerings
- **Performance Ratings**: Customer reviews and ratings that provide insights into product quality and vendor performance
- **Payment**: Integrated payment processing and order management systems that streamline the purchasing process
- **International Support**: Support for multiple languages, currencies, and international legal frameworks, making it easier for businesses to operate in global markets

B2B marketplaces have many potential benefits, including cost savings for buyers, increased efficiency, and better collaboration between buyers and sellers. At the same time, they tend to evolve into walled gardens. Marketplace providers—typically software companies—are incentivized to keep competition out, and eventually become enamored with the fees that their platform can generate. It remains to be seen whether marketplaces consolidate and grow, or whether parochial fragmentation keeps their share of B2B go-to-market activity capped.

Looking Ahead

B2B go-to-market has already changed massively in the past several decades, with new channels, platforms, and digital motions slashing costs, increasing efficiency, and moving massive information power from the seller to the buyer. We foresee the pace of change increasing again over the next decade, and while it is impossible to predict exactly what will happen, a few broad trends are already apparent.

Shift from Growth to Profit

While growth remains the top objective for sellers, businesses are increasingly focusing on profitability as a measure of success. The easy-money monetary policy that dominated from 2008 to 2022 is over for venture-backed companies, and investors want to see more EBITDA and less cash burn. In turn, the allowable cost to acquire a new user (sometimes called CAC, or Customer Acquisition Cost) is much lower for pretty much everyone than even 12 months ago.

On the flip side, the value that customers are likely to bring to an organization will also become more of a focus. In the rush to acquire subscriptions, businesses didn't focus much on who was likely to be a loyal user—or the tactics required to make flaky customers loyal ones (engagement). This will change, as customer lifetime value becomes a metric equally important to CAC.

Continued Migration to Digital

The movement of marketing, sales, and experience motions to devices will continue apace. The Covid-19 pandemic drove businesses online even faster than they were already moving—and it doesn't seem likely that white collar workers will ever return to the office in the numbers they were in February 2020. Digital tools for sellers (better targeting, better immersive content) and for buyers (better filtering of unwanted information, faster search) will continue to evolve in a kind of "marketplace arms race" for the foreseeable future.

Product-Led Growth

As products continue to digitize, it will be the products themselves that function as marketing and sales channels. This is easy to see for software as a service (SaaS); once you have a login (your email), you are essentially a captive audience. Happy users can invite other users to join their network, and marketing messages can be sent to an essentially captive audience.

However, this trend will accelerate in other industries that to date have not had serious digitization. As insurance becomes more and more portal-driven, it will be possible to market and sell through the product itself. Even heavy equipment is now IP-enabled, making it possible to order parts, additional machines, or services in the product itself.

Artificial Intelligence

The release of ChatGPT 3.5 and 4.0 in early 2023 stunned everyone. It suddenly became possible to create content—whether written, visual, or code—from a well-written text prompt, instantly. Early adopters quickly created more autonomous AI agents that could perform tasks with general goals and minimal human interaction.

It is clear that AI will disrupt the entire go-to-market ecosystem. It's too early to say exactly what will happen, but so far, two camps have emerged. On the one hand, many are saying that human labor will be supplanted quickly by agents. The sales rep job, in particular, seems ripe for disruption. On the other hand, it's possible that AI "co-pilots" will superpower what humans can do, driving rapid productivity growth in marketing and sales. Both are probably partly true.

Future-Proof Your Go-to-Market

An executive faced with building or retooling a go-to-market strategy in the second half of the 2020s faces a dynamic, uncertain road. However, the basic building blocks of go-to-market remain stable. First, figuring out where and how it will grow, and through what channels; we call this Growth Design.

Growth Design

As companies grow, they typically go through discrete go-to-market stages. In the startup phase, the primary focus is creating a viable business model and securing funding. Growth happens with a minimum viable product and initial product-market fit. If the idea is good, it will be accepted by early adopters.

After the big idea gets its first few customers, early-stage venture companies are often surprised that growing isn't as easy as it looks. Those first few buyers are excited to use your product or service. After that, growth becomes a goal in and of itself. Growth-stage companies often face challenges in maintaining their culture and identity as they grow, managing cash flow, and navigating increasing competition. This is also the stage when a startup may transition to being a public company, which comes with increasing scrutiny on growth metrics—including compound annual revenue growth and EBITDA.

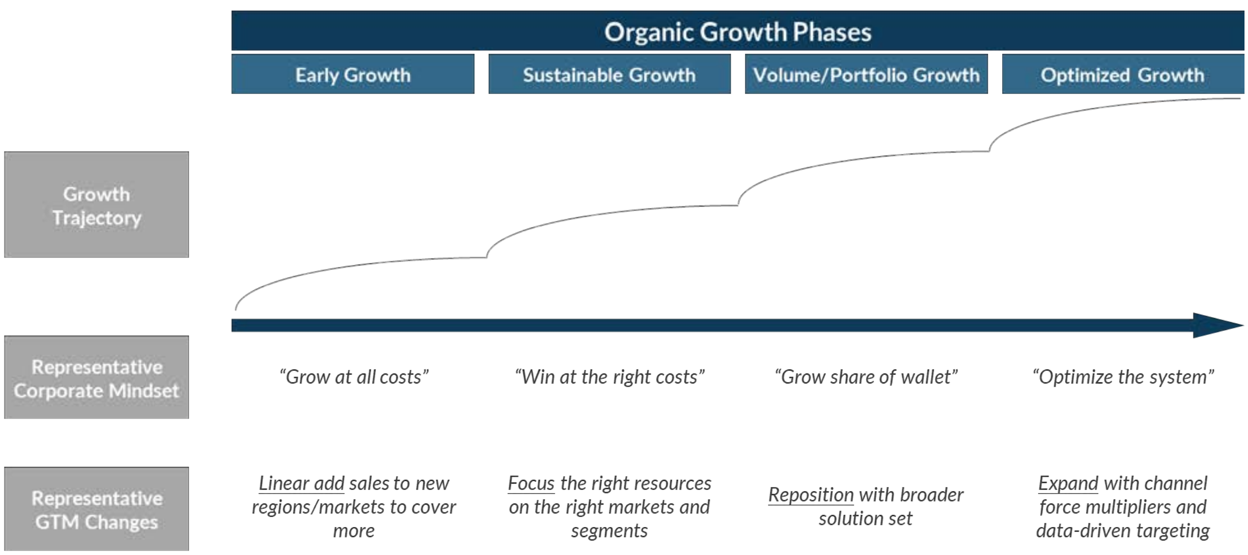


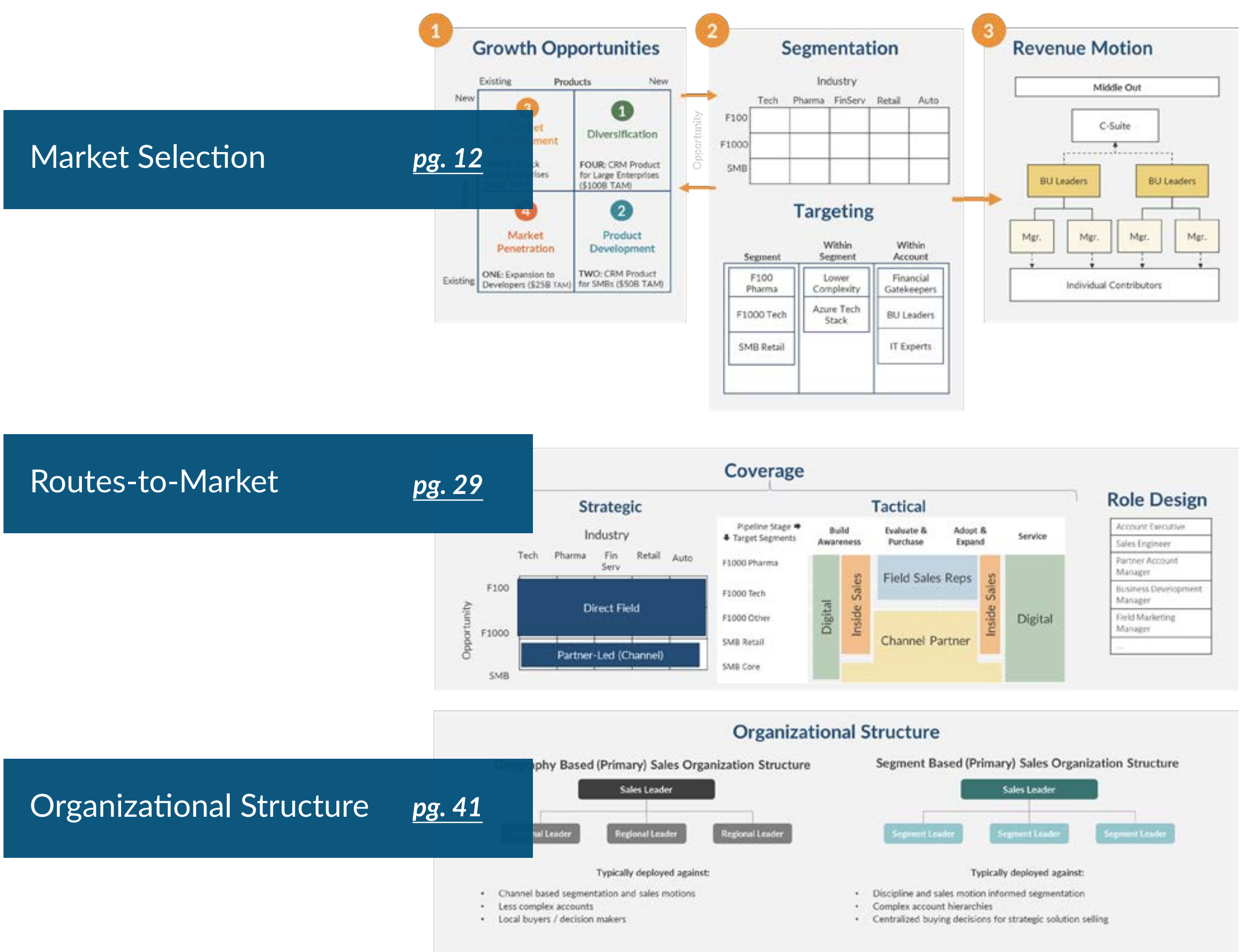
Figure 2: Four organic growth phases

Once established, mature companies have their own challenges with growth. In the expansion stage, companies must typically find all new markets and explore new business models. This often requires significant investment—which comes with increasing complexity. The consolidation phase is characterized by a focus on maintaining profitability, defending market position, and optimizing operations. In the consolidation phase, growth can be hampered by large bureaucratic overhead and a corresponding inability to move quickly—legacies of the complexity added in previous stages.

The good news is that in any of these stages, driving growth is not some arcane, mysterious practice. At MarketBridge, we think of growth as a factory. The factory starts with blueprints; gathers raw materials; assembles and adds value to those raw materials in assembly lines; and ships the product out the door.

The three sections of these blueprints are Market Selection, Routes-to-Market, and Organizational Structure. Market Selection is externally focused—what are the big revenue objectives that we should pursue, how should we think about segments and the focus targets within them, and how should we activate inside accounts with plays? Routes-to-Market are about how we actually get to those accounts—via marketing and sales channels. And finally, we need an Organizational Structure that supports our strategy.

The Blueprints to Growth Design



Growth Nuances in Different Industries

Technology companies can experience rapid early-stage growth due to the scalability of their products, strong profit margins and the potential for global distribution.

These companies may focus heavily on building relationships with corporate clients, providing customized solutions, and managing data security and privacy. However, as competition increases and new technologies emerge, they face challenges in maintaining growth and profitability.

Financial Services companies often experience slow and steady growth driven by customer acquisition and retention.

These companies may focus heavily on building relationships with corporate clients, providing customized solutions, and managing risk. These companies may experience occasional spikes in growth when they introduce new products or when they acquire other companies, but overall their growth tends to be more conservative than other types of companies.

Healthcare companies may experience slow growth in the early stages due to the high cost and regulatory burden of bringing new products to market.

However, once a product is approved and established in the market, healthcare companies can experience sustained growth for long periods of time due to defensible competitive moats. Even so, healthcare companies need to continue to invest in relationship building and distribution excellence to defend against new entrants—whether payers, providers, drugs, or devices.

Manufacturing companies often experience slower growth due to the capital-intensive nature of their operations.

They focus heavily on building robust supply and demand chains, including dealers and service providers. Closed manufacturing ecosystems can be ripe for disruption, however—typically from lower-cost providers. A key growth motion for manufacturers is understanding where the next disruption is likely to come from—and putting in place the infrastructure to defend against it.

Market Selection

It is always tempting to look inward when thinking about strategy. Starting with organizational problems, technology integrations, or new data sources can be more comfortable for executives because these issues are well known as easily accessible. However, growth starts outside the walls of the enterprise, and that's where Go-to-Market strategy should start. After all, market is literally in the title of the discipline.

The three elements of Market Selection are:

1. **Growth Opportunities:** The chunky, big areas of growth that the enterprise should bet on over the next few years to grow revenue
2. **Segmentation and Targeting:** Understanding the universe of accounts and the roles inside of them, and deliberately choosing targets within them (and ignoring others)
3. **Revenue Motion:** The strategy inside of an account to actually land the revenue, matching buyers with value

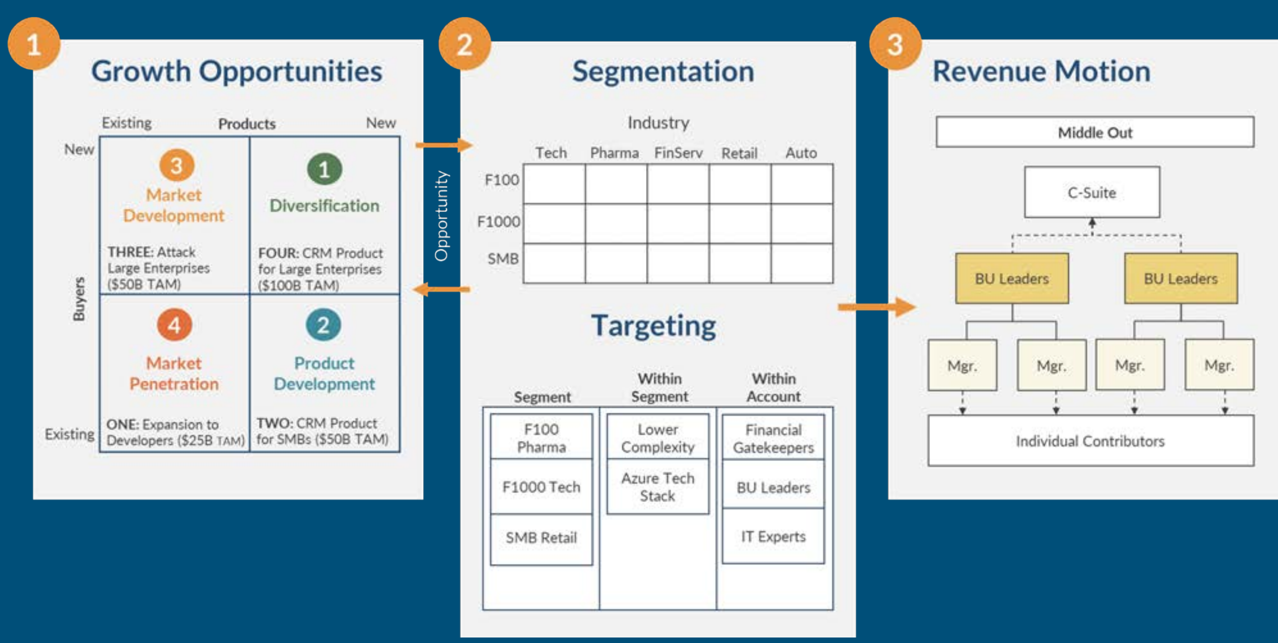


Figure 3: The three elements of Market Selection: Finding Growth Opportunities, Segmentation and Targeting, and defining Revenue Motion

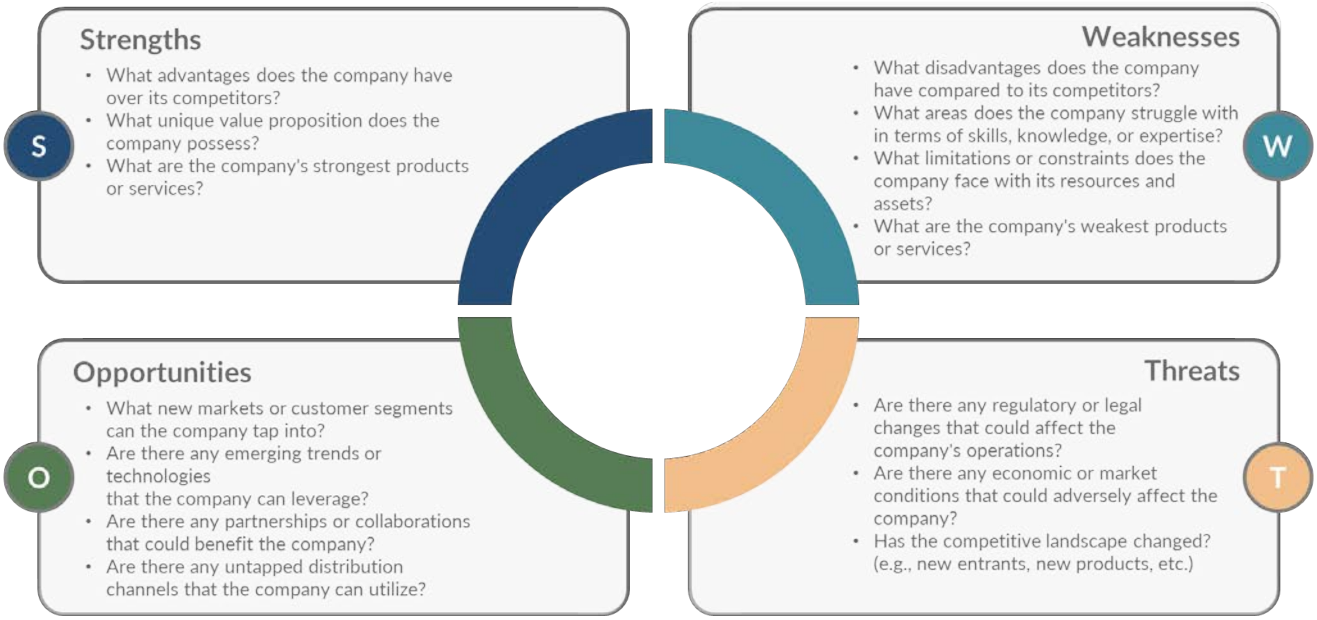
Opportunity Mapping

Finding growth starts with an accurate assessment of the business landscape. A SWOT (Strengths, Weaknesses, Opportunities, and Threats) analysis is a good place to start. In a SWOT analysis, Strengths and Weaknesses focus on the product or offering, while Opportunities and Threats have to do with the external market. Both lenses are critical when prioritizing growth markets.

Both internal expertise and external research should inform the SWOT analysis. The sales force is a great place to start; sales reps have daily interaction with customers, and understand the competitive environment particularly well. Customer service is another critical source of information; customer service organizations understand both the points of delight and the critical points of frustration with the product or offering.

The output of this analysis should be a MECE (mutually exclusive, collectively exhaustive) set of prioritized opportunities. Each opportunity should be roughly quantified in terms of revenue, along with required investments in product and go-to-market efforts. At this stage, detail is not needed; what is important is a comprehensive understanding of the marketplace to avoid being surprised by unseen growth pockets later in the process.

Figure 4: While "basic", a SWOT framework is an ideal starting point for embarking on a growth strategy.



Once opportunities are defined, an Ansoff Matrix can help structure and prioritize growth opportunities along two key dimensions: Buyers or Markets (Existing and New) and Products (Exiting and New). The strategies defined in the resulting two-by-two matrix are Diversification, Product Development, Market Development, and Market Penetration,

Figure 5: An Ansoff Matrix is a helpful construct to array strategies by relative effort. Selling existing products to new customers is usually most profitable.

1 Diversification - New Products to New Buyers

Diversification involves launching new products or services in previously untapped markets. This strategy carries the highest risk as it requires investing in both product development and market research. However, when successful, it can lead to substantial growth and market dominance. To minimize risks, companies should first conduct thorough market research, identify potential synergies with their existing offerings, and pilot their new products in smaller, targeted segments before fully committing to the new market.

2 Product Development - New Products to Existing Buyers

Product development focuses on introducing new products or services to a company's existing market. This strategy capitalizes on the company's existing customer base and market knowledge, making it less risky than diversification. However, businesses should be cautious to not cannibalize their existing offerings or overextend their resources. To succeed, companies must continuously innovate, conduct customer research to identify needs and preferences, and leverage their established brand to promote their new products.

3 Market Development - Existing Products to New Buyers

Market development involves expanding the reach of a company's existing products or services to new customer segments or geographies. This strategy can be less risky than product development as it leverages proven offerings but requires a deep understanding of the new target market. To effectively implement this strategy, companies must analyze the target market's demographics, preferences, and competitors. They should also adapt their marketing and sales strategies to resonate with the new audience, while considering potential partnerships or acquisitions to expedite market entry.

4 Market Penetration - Existing Products to Existing Buyers

Penetration focuses on increasing sales of existing products or services within the current customer base. As the least risky and costly strategy, it offers the quickest time to value realization. To successfully penetrate their market, companies should invest in customer success initiatives, enhance product offerings through updates or add-ons, and implement targeted promotions or pricing strategies to incentivize purchases. Additionally, focusing on customer retention and upselling opportunities can further drive revenue growth and customer loyalty.

> *Growth Opportunities are the bets companies place for growth; they are the big goals that revenue motions will eventually attack.*

The output of the Opportunity Mapping step is a list of prioritized, concrete, and roughly-sized growth opportunities. Each opportunity should note the product offering, customer segment targeted, opportunity size, likely competitive scenario, and rough investment required—in both product and go-to-market. Once this list is constructed, you can move on to segmentation and targeting.

CASE STUDY

Go-to-Market Growth Design & Implementation

Industry Leading Healthcare Provider Builds New Revenue Stream and Exceeds Growth Projections by 61%

MarketBridge helped a Fortune 100 insurance provider to expand into an untapped marketplace. The Growth Design, Segmentation, Targeting, and in-market execution program doubled the client's customer base in three years.

- ✓ Defined a lucrative market segment that drove over one million new customers in three years
- ✓ CRM targeting model correctly identified 70% of customers in target segment
- ✓ Refined marketing and sales tactics designed to aid and engage customers through the buying cycle
- ✓ Activated in-market leading to drive upstream share-of-voice and down-funnel demand generation

ACCESS THE CASE STUDY >

Segmentation and Targeting

Segmentation and targeting are the processes of rigorously defining and then choosing potential customers. In a business-to-business environment, this is more complicated, as it must be done on two levels: the firm, and the roles within the firm.

> *"If you're not thinking segments, you're not thinking"*
> *–Theodore Levitt*

Segmentation

Segmentation is the process of organizing accounts and the roles within those accounts into distinct groups. It is fundamentally an exercise of simplification; the world is too complex to treat everything individually. These simplified groupings enable revenue leaders to understand where the largest opportunities are, build customer-centric strategies, prescribe differentiated approaches, and deploy resources more effectively. Concretely, segmentation provides a simplified basis for decision making and resource allocation.

Getting segmentation right allows organizations to precisely target, engage with, and service buyers, without adding too much complexity. Organizations can optimize their commercial investments by allocating budget dollars to the most strategic, highest growth, or fastest acting populations of customers. Buyers receive more relevant marketing, the right engagement from sellers, and an appropriate service level post-purchase. Embracing a unified enterprise segmentation approach is a critical first step in bridging the chasm between marketing and sales organizations.

Sourcing Segmentation Data

While B2C segmentation is simpler than its B2B cousin—because it involves individuals rather than complex organizations—the data about those individuals can be difficult to source. Typically, B2C marketers are reliant on quantitative surveys, which can fail to generalize to a database. This is sometimes called the "assignment problem."

There is typically more information about companies than about individuals. Company data is not governed by the same privacy laws that protect individuals; in fact, most companies advertise their capabilities, locations, and executive teams publicly. Marketers can gather this information through online research, 3rd party databases like Dun and Bradstreet and LinkedIn, and publicly available information. This makes actionable segmentation of companies more possible than it is for consumers. Put another way, it's possible to build a census of every business that might be in a given segment, with good accuracy. This is impossible in B2C segmentation.

Segmentation Approaches

The highest-level segmentation in B2B is almost always account size. Larger accounts are more complex, have more revenue potential, and enjoy more attractive transaction economics. Smaller accounts are simpler in their structure, but tend to buy at lower transaction sizes, with less revenue potential. While it might be easier to segment by size using publicly available data like revenue, a more sophisticated metric flips revenue on its head and looks at the opportunity represented by companies as buyers. In other words, opportunity estimates the annual revenue potential of each account assuming all account needs are captured by the company.

The simplest segmentation approach is to divide accounts into opportunity tiers for the purposes of future account coverage, service tiers, pricing, and other tasks. The tiers below are typical for B2B enterprises, but certainly not set in stone.

- **Key Accounts**: Usually 10-100 accounts. Fortune 500 companies (or their international equivalent) who currently buy at high volume.
- **National Accounts**: Usually 50-500 accounts. Fortune 1000 companies (or their international equivalent) with core needs that are or can be met by the company.
- **Core Accounts**: Usually 100-1000 accounts. Large, complex accounts that show demonstrated needs, and might be buying at medium-to-low volume today.
- **Small and Medium Businesses**: Up to millions of accounts. Smaller, simpler accounts that are generally not directly covered, but represent a huge revenue potential.

Adding up all addressable market potential—across every potential account—results in the metric Total Addressable Market (TAM). TAM is the aggregate dollar value of the entire market for a product or service at 100% penetration; in other words, it is the growth ceiling for a firm. While helpful in understanding long-run potential—or valuing a stock—it needs to be further segmented to be useful for go-to-market leaders.

TSM (Total Serviceable Market) estimates the portion of the market that can reasonably be captured given marketing, sales, and product realities. TSM filters TAM to a more realistic subset of potential customers using segment hypotheses. Segment hypotheses codify the types of accounts an organization seeks to capture and grow. Segment hypothesis criteria must be objective, observable, and actionable. Some of the most common segment hypotheses include complexity, geography, and industry.

Complexity

Complex accounts typically have multiple stakeholders with different priorities, unique product requirements, and intricate purchase processes. They are also more expensive to sell to and service. While these criteria at face value are difficult to observe, they can often be diagnosed using historical data such as sales cycle time, CRM logs, or install information.

Geography

While geography-based segmentation has lost some of its appeal in the digital age, there are still good reasons to segment accounts by Country, Region, or even State / Province. Language differences are perhaps the most significant, impacting product, marketing, and sales. Legal differences also play a role;

privacy rules when marketing vary significantly from country to country. Finally, regional business networks or industrial concentrations can make geographic segmentation attractive.

Industry

Industry is often highly correlated with opportunity and complexity, but adds additional nuance. Many B2B companies have great product-market fit with a few industries, weaker fit with others, and no fit at all with many more. A software company, for example, might focus heavily on software pure-plays, targeting developers at those accounts, but might also serve technology-adjacent industries like insurance and banking with a lighter coverage model.

Technographics

Information is now available about companies' technology stacks, use cases, and technology adoption rates. For companies selling technology, this can be invaluable. Taking this a step further, any information directly related to the use case for a product or service can be helpful in segmentation—as long as it is relatively simple and actionable. Further messaging refinement can happen down the funnel at the Account-Based Marketing (ABM) or sales steps.

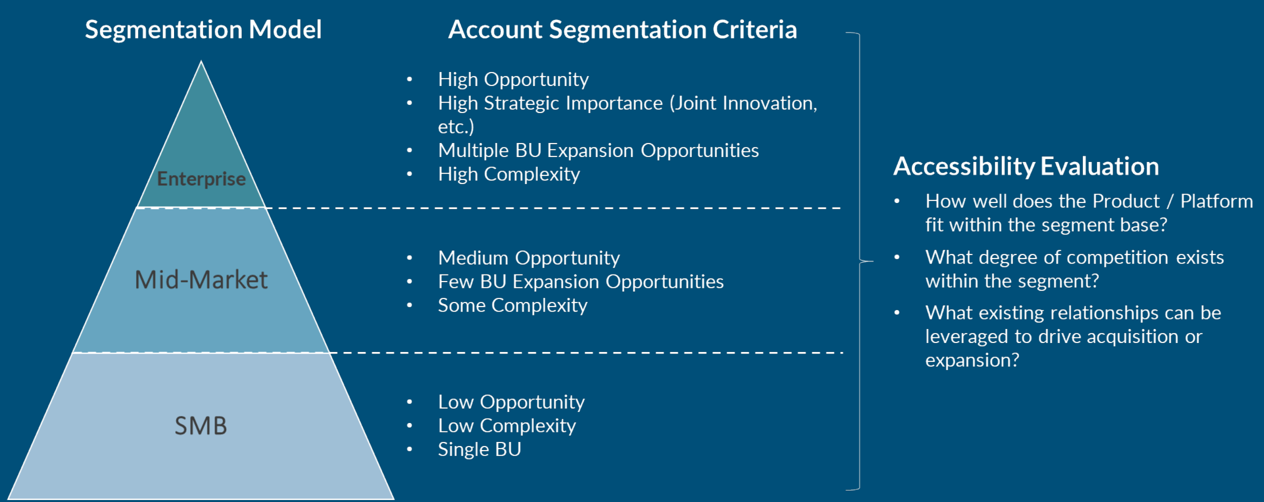


Figure 6: Example Criteria for Three-Tiered Segmentation Model

Common Segmentation Pitfalls

Inside-Out Segmentation

It is tempting to rely on historical revenue to segment accounts; this can cause problems for two reasons. First, past successes can be a poor indication of future account opportunity, especially in dynamic marketplaces. While high revenue, low complexity customers are important, they may not require the same resourcing or strategic focus as similar accounts where there is significant incremental opportunity.

Inside-out segmentation also completely misses new opportunities. Upstart companies growing quickly might be completely off the radar, allowing competitors to swoop in at an early stage.

Grandfathering Account Classifications (Hoarding)

Sometimes, organizations classify accounts based purely on pre-existing relationships. Managers and leaders may believe that this lowers the risk of customer churn, or they may give in to sellers' demands to hold onto specific accounts. While there is always a seemingly good reason in the moment to make exceptions, over time grandfathering and account hoarding creates serious resource misalignment, limiting the ability to economically scale.

Too Many or Too Few Segments

Segmentation should not be used to solve every buyer-seller nuance. Many-layered, matrixed segments seeking to account for differences in product, industry, sales stage, or stakeholder type drive administrative complexity and additional cost.

At the same time, overly simple segmentation schemas fail to account for differences in customer value and needs. Resulting marketing and sales coverage models are then mis-aligned, resulting in a loss of commercial opportunity.

Segmentation Best Practices

Between Three and Five Segments

With perfect information and zero transaction cost, every customer or prospect would exist as a segment of one. While technology—particularly generative AI—is getting closer to this outcome, revenue professionals still need simple frameworks to do their jobs. Concretely, keeping the number of segments between three and five provides the right balance of simplicity and discrimination.

Common Segment Understanding

Sales, marketing, and service organizations should use the same customer segmentation. Unfortunately, this is easier said than done. Marketing will often argue for a more needs-based, psychographic segmentation—as they are creating one-to-many messaging that must resonate. Sales, on the other hand, tends to be focused more on concrete metrics. In B2B organizations, the concrete, sales-focused should function as the master segmentation, and the needs-based segmentation can function as an overlay.

It is even more challenging to extend the segmentation schema to product, operations and finance—but this is still a worthwhile endeavor. Socialization is critical when activating and driving segmentation adoption throughout the organization.

Clearly State and Enforce Segment Policies

Segmentation aligns prospects and customers into groups for two purposes; to help organizations engage more efficiently, and to benefit customers by providing them with the resources that they require to be successful. This relationship tends to break down when teams do not understand the policies, or when leaders do not oversee and enforce the segment policies.

The most successful organizations have clear guidelines, exception policies, and a governance process for account-segment assignment. These systems safeguard the structure of the segments, while ensuring that any concessions that are made are done so for good reason.

Keep Up with The Joneses

As a business' customers, competitors, and products evolve, so must its segmentation model. Staying relevant requires a regimented management approach. Segments should be reevaluated at least once every three years—usually as part of the commercial planning process, where leaders and their teams come together to retrospectively assess segment performance and evaluate new segment hypotheses.

Targeting Buyers

Targeting is the process of prioritizing segments and accounts. Targeting is a choiceful exercise, forcing revenue leaders to make bets on resource allocation. In many B2B go-to-market organizations, this is a difficult exercise, because someone in the sales force will definitionally be disadvantaged if their accounts are de-selected. This is why targeting is so intimately related to the more mechanical action of territory design.

Segmentation vs. Targeting Confusion in B2B

The distinction between targeting and segmentation in the B2B space is often confused, and with good reason. Both seek to classify customer groups, and they both serve as a tool to determine how to tailor sales and marketing efforts. However, the nuance between the two is an important one. While segmentation serves to understand accounts within the serviceable marketplace, targeting seeks to enhance the organization's ability to access, influence and persuade the individuals within the accounts that make purchasing decisions.

There are three levels of targeting: Segment Targeting, Within-Segment Targeting, and Within-Account Targeting. Segment Targeting is prioritizing the segments defined in the segmentation exercise: For example, we will focus on Large Enterprise (based on opportunity) healthcare (based on industry) companies for Tier "A" acquisition efforts. We might also intentionally state that we will not be focusing on Large Enterprise technology companies.

Segment Targeting is straightforward: executives simply select segments for focus based on the segment hypotheses outlined above. The challenging part is socialization, communication, and operationalization. This generally happens in the annual forecasting and budgeting process. The target segments get higher goals, and correspondingly receive more attention from both marketing and sales.

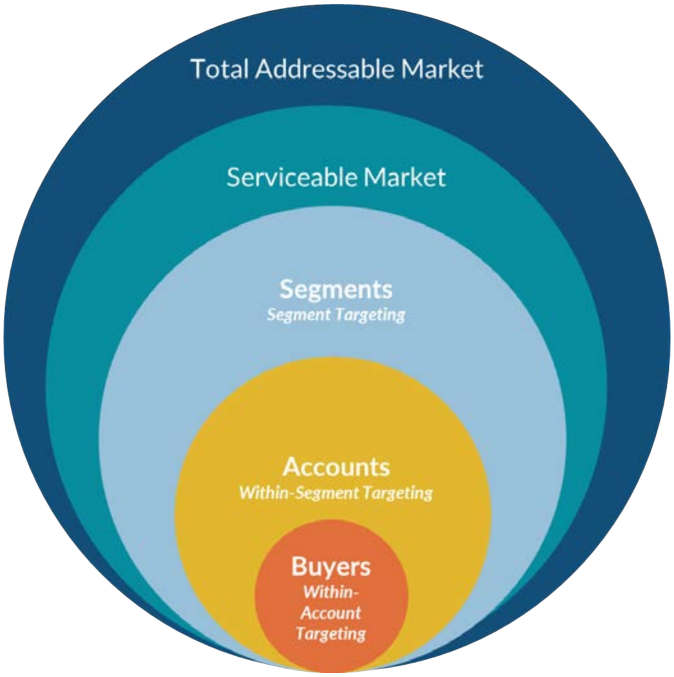


Figure 7: Segmentation and targeting can be thought of a series of magnification lenses—from wide angle (the total addressable market for the entire enterprise) to microscopic (individual buyer and influencer archetypes within accounts.)

Within-Segment Targeting

Within-Segment Targeting has historically been a bottom-up process owned by the sellers. Sellers are typically tasked with looking through the accounts in their territories and constructing plans to move existing opportunities through the funnel, or drum up new leads to capture revenues. However, these plans rely heavily on seller intuition and existing relationships, and can miss big opportunities. Ironically, at the end of the performance period, it is those same sellers who end up holding the bag: only 28% of sellers expect to meet or exceed their annual quota.[1]

Instead, within-segment targeting should be data-driven and scientific. Account data should be carefully enriched with segmentation metrics in the CRM database, and these metrics should be updated at least annually. These data can then be used to prioritize accounts within each segment. Seller input is still important, but ultimately, data, not emotion, should drive targeting. In addition to segmentation dimensions already discussed such as opportunity, complexity, geography, and industry, revenue leaders can add more nuanced data like product-market fit, competitive presence, and relationship strength to create more advanced rubrics for within-segment targeting.

Within-Account Targeting

Targeting can be taken even further—down to the specific buying situations and roles inside accounts. Buyer scenarios are the specific use cases that describe how buyers, influencers, budget holders, and users work together to generate the need, evaluate services and products, and make final decisions. These scenarios should take into account various factors such as the problem to be solved, the urgency of the need, the company's budget, and the existing solutions in place. By delving deeper into these aspects, a clearer understanding of the buying dynamics can be achieved.

> ***Buyer scenarios are the specific use cases that describe how buyers, influencers, budget holders, and users work together to generate the need, evaluate services and products, and make final decisions***

Researching and describing buyer scenarios is a qualitative—not a quantitative—exercise. In this process, stakeholder archetypes are interviewed to understand how they define and evaluate solutions, as well as how they work together to make decisions. This may involve conducting in-depth interviews, focus groups, or even observing stakeholders in their natural work environments to gain insights into their pain points, motivations, and decision-making processes. While every buying event is "unique," they can be combined into lookalikes—buying scenarios that share similar characteristics and patterns.

Understanding and segmenting buying scenarios allows businesses to better understand the roles that interact in each scenario. Roles such as ultimate decision-maker, finance gatekeeper, technical evaluator, and end user provide more granularity than the generic term "buyer." Each of these roles plays a distinct part in the buying process:

- **Ultimate Decision-Maker**: This individual is responsible for giving the final approval or veto on the purchase. They are typically in a high-level position within the organization, such as a C-suite executive or director.
- **Finance Gatekeeper**: The finance gatekeeper has the authority to approve or deny budgets and financial resources for a purchase. They ensure that the proposed solution aligns with the organization's financial goals and constraints.
- **Technical Evaluator**: This role is responsible for assessing the technical feasibility, compatibility, and functionality of a product or service. They ensure that the solution meets the organization's technical requirements and can be effectively integrated with existing systems.
- **End User**: The end user is the individual or group who will ultimately utilize the product or service. Their input is crucial, as their satisfaction and adoption of the solution will determine its success within the organization.

Once buyer scenarios and roles have been defined, sellers and managers can tag contacts with roles and opportunities with buyer scenarios inside the CRM system. Then each can be targeted with customized messaging and positioning—a great example of sales-marketing collaboration.

A Segmentation and Targeting Story: HubSpot[2]

HubSpot, a pioneer in inbound marketing technology, launched a CRM platform to simplify the administration, implementation, and utilization of complex CRM platforms. Based on opportunity and complexity, HubSpot should have prioritized the largest, most strategic opportunity segment first.

However, leaders recognized that penetrating that segment would be difficult. For one, large incumbents such as Salesforce and Oracle had already made significant inroads in the space, locking HubSpot out of many opportunities for the foreseeable future. Second, Hubspots' existing core customers were small- to medium-sized businesses. Finally, the product, which sought to simplify the user experience, did not have the advanced features and capabilities required by more complex organizations.

Describing the segmentation and targeting decision, HubSpot CEO Yamini Rangan said "What we find is that the customer experience for a 500-person company or for a 1,000-person company is quite different and their expectations are quite different than a 10-person small business."

HubSpot ultimately chose to prioritize the SMB segment for the launch of its CRM, and at the time of this writing, is only now—almost a decade later—seeking to move upmarket with a more complex offering.

Targeting Pitfalls and Best Practices

Research in Buyer Scenario Analysis

Revenue professionals are usually very empathetic people—it's a job requirement. However, overconfidence can lead to inaccurate buyer personas and purchasing scenarios that fail to depict the realities facing buyers within an organization. Trust your instincts, but rely first on primary qualitative research and secondary market research to ensure accuracy.

Overreliance on Demographics

While demographic data is easy to come by and actionable, it's important to also consider psychographic factors such as attitudes, benefits, fears and values. Focusing too much on demographics can lead to a onedimensional view of the buyer, which can limit the effectiveness of targeting and messaging strategies.

Psychographic insights can be hard to source at scale, because they usually require primary research. Even typing tools are hard to deploy in a B2B context—sellers are understandably reluctant to ask potential buyers a set of survey questions. However, adding carefully chosen picklists to CRM systems with a few options can be a solution. In this case, you can trust your human sellers for their insight into what kind of a buyer a contact is.

Stagnant targeting

Even the best targeting programs can benefit from continuous improvement. Neglecting to track and analyze the effectiveness of targeting efforts can prevent commercial teams from staying current with the buyer population resulting in outdated buyer scenarios and messaging that falls flat when delivered. Check in on your targeting effectiveness each year during the annual planning period. Tracking lead-to-close rate, average opportunity size, and customer satisfaction by target company and by role archetype can reveal deficiencies, or unexpected pockets of value.

Revenue Motions

Historically, B2B organizations described their growth designs as Sales Motions. However, as Go-to-Market strategy has rapidly evolved to be less outside-in and more customer-driven—namely around innovations like product-led marketing, account-based marketing, and customer-centric buying behaviors—the term has become outdated.

Instead, we use the term Revenue Motion: the deliberate method of entering and expanding inside of accounts. Revenue motions are customer-centric; they describe how accounts—and the customers within them—can best identify, try, and ultimately purchase a product or solution. They are essentially the translation of within-account targeting into a growth thesis.

> ***Revenue motions describe how accounts—and the customers within them—can best identify, try, and ultimately purchase a product or solution***

Revenue motions—and the upstream segmentation and targeting that precede them—function as blueprints for all customer-facing aspects of the enterprise. This can be a challenge for organizations with siloed marketing, sales, and service departments. Common understandings of revenue motions provide a concrete substrate for collaboration. By understanding how accounts and contacts try, buy, and use the product, marketing, sales, and service can work together, using the account as the forcing function.

There are three primary revenue motion archetypes, each representing a different primary entry point into the organization: Top-Down, Bottom-Up, and Middle-Out.

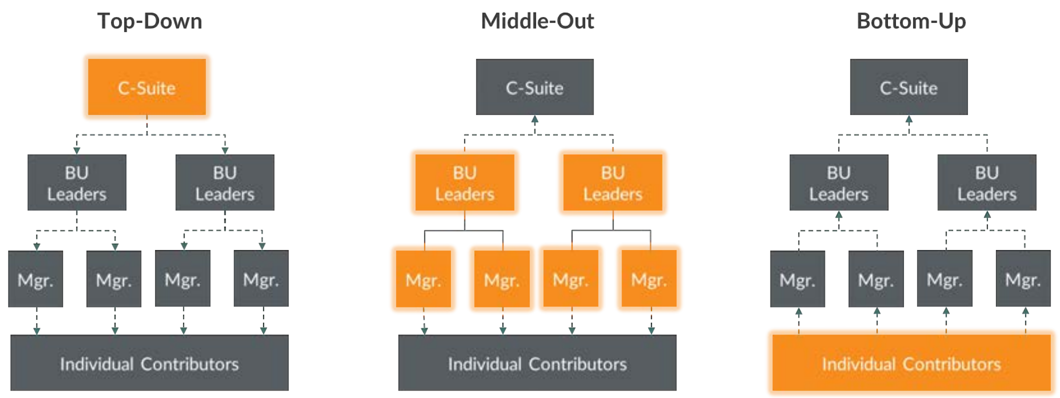


Figure 8: Three archetypical B2B Revenue Motions: Top-Down, Middle-Out, and Bottom-Up. Bottom-Up motions have become extremely popular for "product-led growth" models.

Each archetype has advantages and constraints that revenue leaders must evaluate prior to selecting a primary motion. Revenue leaders can evaluate which to choose by considering adoption method, value transfer, and price:

- **The adoption method** describes how potential customers find, try and purchase a given solution;
- **Value transfer** describes who seeks to benefit from the implementation and utilization a given solution;
- **Price** describes the affordability of the solution for a given set of stakeholders.

Top-Down Revenue Motions

Top-Down is the most traditional revenue motion, focusing on high level (typically C-suite) stakeholders at customer or prospect organizations. In a Top-Down motion, sales teams build and leverage relationships with senior stakeholders to drive product choice, and rely on those client stakeholders to drive implementation down throughout the broader department or organization.

Adoption Method

This motion relies on senior leaders to drive standardization throughout the organization. The solutions cannot be adopted by a single user or small department within the organization. They tend to be very complex and customized to an enterprise's unique needs.

This strategy is contingent on access to key decision makers within the company, primarily relying on direct sales resources to generate demand. Humans are critical to navigate the path to purchase, with marketing playing a secondary role.

Value Transfer

While managers and individual contributors may interact with the solutions once purchased, the value is ultimately realized by the company as a whole—and individual contributors can feel removed from the product or solution. This can be a challenge when it comes to upsell and cross-sell, without a strong groundswell from the rank and file to improve or add-on to the product.

Price

Top-down revenue motions target individuals within an organization that own or have influence over budget. As a result, prices (and realized revenue) for these solutions tend to be significantly greater than bottom-up or middle-out. While these deals range in size, the expectation for revenue leaders is typically an annual contract value greater than $200,000, and often exceed $1,000,000. However, this price can also be a barrier; it's significantly more difficult to find million-dollar budgets than $20 per employee per month (PEPM).

Bottom-Up Revenue Motions

Whereas a Top-Down revenue motion seeks to push product adoption down into the organization, a Bottom-Up motion does the opposite. Bottom-up revenue motion acquire end users, only elevating to more senior levels once a critical mass of users have adopted the product.

Products in Bottom-Up models are offered through self-service channels, and are typically free to start with, or offer extended trial periods. In many cases, software offered through this motion is open sourced, encouraging developer adoption. The Bottoms Up revenue motion has been a popular revenue motion in recent years—particularly for white collar technical workers—and is the primary revenue motion for product led growth (PLG) organizations.

Adoption Method

Because there are many more end users than senior executives (typically tens or hundreds of thousands of individuals) per organization, marketing (rather than sales) plays the lead role in helping potential customers find, understand and adopt the product. In this scenario, end users (i.e., individual contributors) typically acquire, use, and start paying for a product without any direct involvement from a sales team.

In the early stages of the process, sales typically plays a more reactive role, engaging when customers raise their hand and helping to convert free-users to paid subscriptions. However, once a critical mass of users become concentrated within a given customer, sales teams are typically required to consolidate billing under a larger contract, and cross- and up-sell. This requires finding budget holders, either at the business unit or corporate level. Sometimes, this can be a significant administrative task, particularly if many end users are already paying monthly premium user fees on their personal or corporate credit cards.

Value Transfer

Here, the product does the majority of the selling, relying on low barriers to entry, quick time-to-value, and a broad appeal. Value must be delivered out of the box, with little to no cash handover. This means that customized and/or capital-intensive products can't use Bottom-Up motions. Put another way, there's no free Accenture Consulting or Caterpillar bulldozer tier.

For higher level stakeholders such as managers, directors and other senior team members, value is typically placed behind a contract or paywall. This may include features and tools that provide management line of sight to team member activity or provide greater organizational intelligence required for management decision making.

Price

In a Bottom-Up revenue motion, adoption is the initial objective; revenue comes later. As such, prices tend to be significantly lower compared to other revenue motions. Individual end users may use free versions of the product, or be charged a nominal monthly or annual fee which can be purchased with a credit card for typically less than $50 per month. ChatGPT, the popular AI platform from OpenAI, offers premium access to users for $20 per month, and basic access to its more primitive engine for free. These will doubtless be swept up and monetized into corporate licenses in the coming years once users make it part of their daily workflow.

Once organizations centralize end user licenses, price typically becomes a function of the number of end users (licenses) times a per user / per month license fee. This is known as per employee per month (PEPM) pricing. These fees can range between $5 for basic products to over $200 for complex products. Utilization-based pricing is typically used for cloud or API-based services.

Depending on the size of the user population or the load on cloud services, these contracts can vary dramatically in total value. A small HR software company might realize $25,000 per company, while a large cloud provider might end up with total billings in the tens of millions of dollars. A note of caution: while demand-based cloud services provide instantly available compute and storage, overuse can leave buyers with nasty surprises when it comes to billing time. Account Executives at cloud companies need to be extra mindful of usage, warning buyers if their usage is outside of expected bounds.

Middle-Out Revenue Motions

Middle-Out revenue motions offer a compromise between the Top-Down and Bottom-Up methodologies. Products sold through this model must benefit both end users and C-suite level stakeholders. However, the sweet spot is typically at the manager or director level. These mid-level stakeholders serve a dual purpose; they push the product usage down to the individuals in their teams, and also serve as a champion for executive level buyers, unlocking access to larger budgets. Products in a Middle-Out revenue motion are usually purpose-built for operational tasks handled by specific teams within a company, like marketing, customer support, software development, or engineering.

Adoption Method

Middle-Out revenue motions are sometimes termed "land and expand," in other words, starting with one use case or business unit at a customer organization and sequentially movin,g to new buying centers until standardization becomes a viable option. At this point, higher level (C-suite) stakeholders become engaged, and the revenue motion can transition to Top-Down.

A Middle-Out motion is balanced between marketing and sales to proactively drive demand and adoption for new customers. Sometimes, self-service channels are used to drive trials, but unlike the Bottom-Up motion, the most important features of the product remain locked behind the pay/contracting wall. This allows potential buyers to gain experience and familiarity with the product, while leaving significant value on the table for sales teams to capitalize on in the future.

Value Transfer

When it comes to Middle Out revenue motions, the value transfer is applicable both to individual users and their management teams. Products that apply to a Middle Out revenue motion can be used by individuals to help with day-to-day task operations, but when scaled to broader teams unlock greater benefits to an organization as a whole.

Price

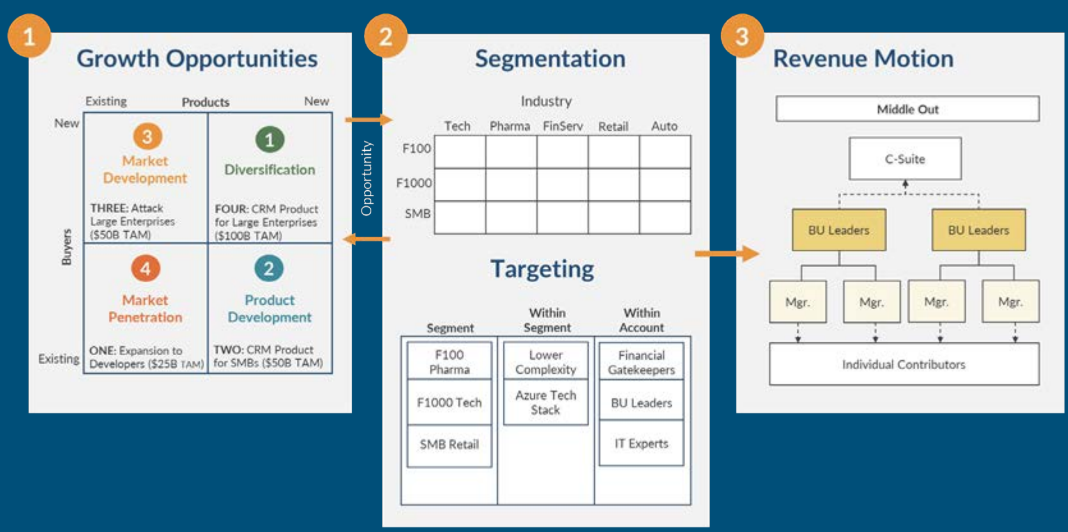
Pricing for Middle-Out motions can vary greatly due to the nature of the products and focus of the revenue motion (i.e., land and expand). The initial "land" deal tends to be smaller in value, focused on a single buyer, typically ranging anywhere from $20,000-$250,000. However, for larger enterprise customers with multiple buyer groups and use cases, these contract values can be much higher. Once "expanded" through the organization, middle-out-led motions can generate multiple millions of dollars of revenue per year.

Routes-to-Market

While the Market Selection process looks at the world from the perspective of the customer, the Route-to-Market Planning process is concerned with the company getting to the customer. Route-to-Market Planning includes marketing and sales channel selection and channel economics; addressing channel conflict; and role design in the internal sales force. It is very much a mechanical and economic exercise, where market selection is an empathetic and creative exercise.

Figure 9: Route-to-Market Design (below) related to Market Selection. These two processes, while portrayed linearly, should ideally happen concurrently and iteratively.

In the Market Selection phase, the company has chosen to acquire large enterprise with its existing product and expand into its core SMB account base with a new CRM product. It will use a middle-out revenue motion.



In the Routes-to-Market phase, the company must choose which channels to use to cover its target segments, and how specific roles should interact through the buying cycle with individual accounts.

Market Selection and Route-to-Market Planning are intimately linked, and thus must be designed concurrently and iteratively. It would be a mistake to run each process in sequence, only thinking about coverage and role design once market selection and revenue motions have been finalized. Instead, two teams should work in concert, communicating regularly, and ending up with an integrated Market Selection and Route-to-Market strategy that works together.

Coverage Design

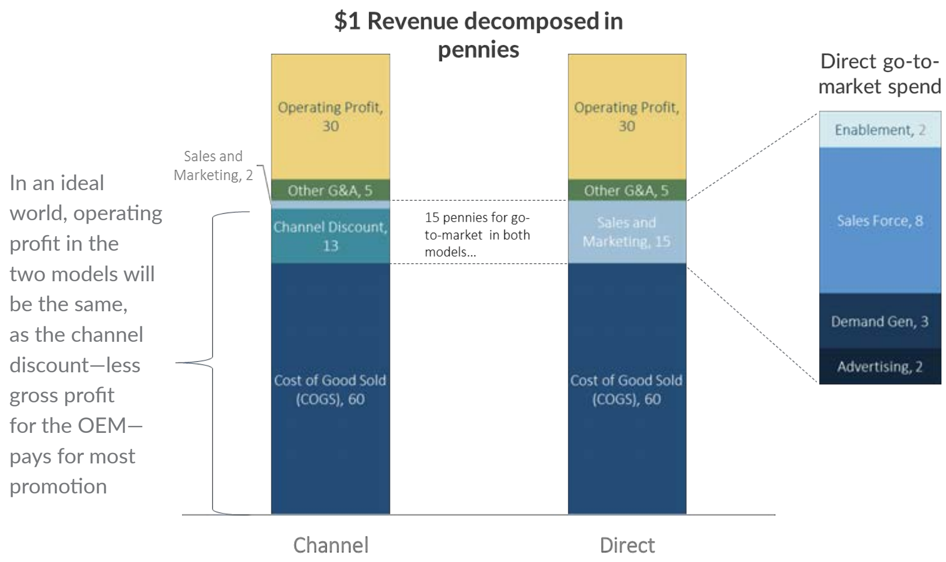
A coverage model is the formalization of revenue motions, including the specific channels and roles that will perform each task. Well-designed coverage models allow organizations to execute revenue motions at the lowest possible cost (typically measured as E/R or expense / revenue), while maintaining best-in-class customer experience. Coverage models map critical customer touchpoints with the resources required to service them.

Coverage design is typically approached at two levels: Strategic and tactical. At the strategic level, overall channel models are mapped to market segments (see Segmentation and Targeting above.) At the tactical level, coverage is mapped inside accounts, and across the sales pipeline.

Strategic Coverage Design

Strategic coverage design is a long-term, high-level decision about which channel should be used to cover which focus market. At the highest level, this means choosing between direct and indirect coverage. Direct coverage simply means using a company's internal resources to drive revenue; indirect coverage means outsourcing go-to-market activities to an agent.

Figure 10: Channel (indirect) vs. Direct economics. The channel discount--13 cents per dollar in this example--essentially pays for go-to-market other than brand advertising.



Indirect coverage—called "the channel" in B2B tech go-to-market—is attractive for many reasons. First, it can be activated quickly; there is no hiring, training, quota setting, territory design, or sales management layer that needs to be put in place to get revenue flowing. Second, many channel partners offer full-funnel solutions, including marketing, sales, and integration—potentially saving both lead generation and downstream consulting dollars. Finally, channel partners can offer your product or solution along with other complementary products—creating a bundled value proposition that may be more attractive than selling the product by itself.

Indirect coverage comes with a literal cost—the channel discount or commission. In the discount model, channel receives the product at a significantly lower cost than it would be sold direct—usually around 5-15%. This literally replaces the S,G&A that would be spent directly marketing the product. The tradeoff between the loss in gross margin (because revenue – cost of goods sold (COGS) is less than it would be if selling direct) and the increase in S,G&A is a critical economic calculation to make when deciding on strategic coverage. In the commission model, dollars are distributed to the channel for each unit or dollar sold—similar to the commission paid to direct sales reps. An illustration of this trade-off can be found above in Figure 10.

Technology	Insurance	Investments	Heavy Industry	Consumer
"The Channel"	Agents	Brokers	Dealers	Retail
Systems Integrators	Brokers	Advisors		
Value Added Resellers		Wirehouses		

Figure 11: An incomplete list of terms for the indirect channel, by industry

The **direct coverage** model disintermediates the channel, instead selling directly to customers. Achieved revenue is higher without a channel discount, but marketing, sales, and integration costs take their place, eating into operating profit. In most cases, direct coverage models need employees—whether inside sales, field sales, field marketers, or integration consultants—to work. While it is possible to automate bottom-up and middle-out models in early stages with digital demand generation and e-commerce, at some point, variable labor costs inevitably come into play.

The direct channel does give more control over the customer relationship—which over the long run is a big advantage. Concretely, this is manifested in owning the customer's data. Mutual fund companies struggle to gather net flow information by customer; tech companies can't keep track of individual device ownership; and heavy industry companies don't know who ordered what machine or part. In each case, channel partners are reluctant to share their data to the original manufacturer. They are fully aware that ownership of end user data is a moat against disintermediation.

When choosing a strategic coverage approach, channel economics are also an important factor. Direct field sales might be effective, but the transaction costs are several orders of magnitude higher than web self-service—and at least ten times more expensive as a more junior inside sales rep. By balancing channel preferences with channel economics constraints, an optimized tactical coverage model can be developed.

- Transaction cost should be calculated as the variable costs + operating fixed costs (allocated) to complete one transaction
- Generally, higher-cost channels add more value to the customer but ultimately, channel economics should serve as a final filter in channel selection.

Consider: Are appropriate channels affordable given customer-channel preference and product-channel fit?

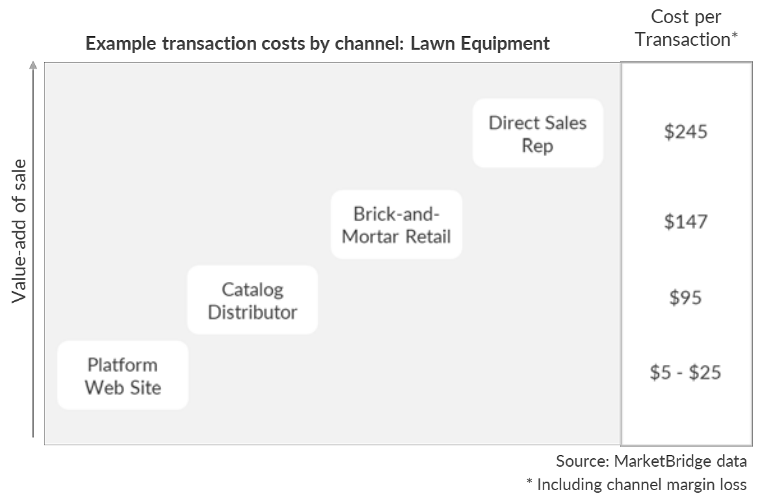


Figure 12: Adjusting for channel economics. Each channel has a different cost-per-transaction. Ensure that go-to-market costs don't overwhelm unit gross profits.

At the end of the day, strategic coverage design has a simple output: which route-to-market are we choosing, generally, for which product-focus segment intersection. It does not need to be complicated; in many companies, there will only be one route-to-market for all products and customers.

CASE STUDY

Optimizing Sales Coverage

Technology Enterprise Sees 42% Improvement in Sales Efficiency with Improved Go-to-Market Sales Strategy

MarketBridge helped a SaaS company assess and target new sources of revenue and then realign its

channel coverage model to reflect channel preference and economics.

- Re-assessed and optimized segmentation and within-segment targeting
- Designed new coverage model and corresponding roles
- Implemented the newly designed go-to-market strategy growing sales efficiency by ~40% and doubling revenue in under a year

ACCESS THE CASE STUDY >

Tactical Coverage Design

Tactical coverage design drills down into the learn-shop-buy process—sometimes called the "pipeline" or "funnel"—to map each interaction. Specifically, the exercise seeks to understand from the customer's perspective how they will interact with the company (or partner). There are three broad families of tactical coverage models in use today:

- Still used by many organizations, the **Single Point of Contact approach** is simplest; one resource the entirety of the sales process, from prospecting to closing, to ensuring post-sales customer success. While simple, this is also expensive and can be inefficient and ineffective.
- The **Hunter-Farmer approach** divides the sales team into acquisition-focused and retention- / success-focused resources. This is still the most common model in use for many B2B selling organizations today.
- The **Hybrid approach** is most specialized, dividing tasks into lead generation, sales, and account management roles.

Growth Focus	Cross-Sell/Upsell	New Logos	New Buyer Groups
Post Sales Touchpoints	Decision Makers	End-Users	Cross-Functional
Volume of Accounts	Medium	High	Low
Transaction Value	Varies	Lower	Higher

Figure 13: Framework for Determining Primary Sales Coverage Model

Designing a tactical coverage model is a function of three interrelated factors: Customer-channel preference; seller and role capability; and economic efficiency.

Channel Preference

When we wrote The Channel Advantage in 1999, we coined the phrase "channels don't choose customers, customer choose channels." The point of that slogan is that even at the dawn of the internet, customers were more and more in charge of their own buying process. Customer-channel-preference research can help illuminate how customers want to learn, shop, buy, and get support. This type of research is simple, but executing it correctly requires very good sample (the same individuals who buy your products) and a very good understanding of the buying process.

For example, end users in a Bottom-Up revenue motion may prefer low-touch, self-service digital channels to optimize for speed, while C-suite level stakeholders in a Top-Down or Middle-Out revenue motion may require additional time, attention and personalization to feel comfortable prior to making a purchase. Channel preference can also vary by stage in the buyer journey. For example, email or digital marketing may be more effective in engaging buyers who are only just exploring a solution to solve their problem, while direct field sales may be required to answer questions closer to purchase.

Role Capability

As products and solutions have become more complex—and buying processes more complex—B2B organizations realized that the job of selling often covered more ground than one person, or resource type could handle. As a result, bifurcated coverage models took hold, starting with broad task allocation such as hunter-farmer models and evolving towards increasingly customized resource sets.

Deploying specialized roles helps ensure the entire process is covered effectively. Selling is, at its core, a sequence of discrete actions which form a process. However, sellers are people, and people have preferences. Some sellers enjoy the thrill of the hunt, ever optimistic that the next call will be the one to make their year. Others are strategists, intimately researching and carefully mapping out their next move to guide prospects further down the purchase process. Others are relationship-driven, expert at building rapport, and forming strong personal connections with prospects.

Sellers, just like all people, self-select the activities that make them comfortable, and where they have historically found success. While any of these strategies can be effective, they cannot be scaled unless placed in the right role and against the right types of customers. This phenomenon holds for sales organizations of all sizes, but as organizations grow, so do the size and prominence of selling costs. In these situations, even small improvements can have a significant impact on an organization's profitability. A well-designed coverage model ensures that all customer touchpoints are covered and that the appropriate resources are allocated to each stage of the sales process.

Shift-and-Lift (Economics)

To achieve an optimal tactic coverage model, separate the highest value activities within the sales process from the more commoditized and align resources accordingly. This division of labor allows revenue organizations to create leverage with lower cost channels (shift), and lift higher value activities to more expensive resources. Generally, value is tied to the level of influence in the deal making process.

An Example of Shift-and-Lift

Say a sales organization has 10 field sales representatives with a mean OTE (on-target earnings) of $200,000 each. In this instance, let's assume that each seller spends roughly 20% of their time prospecting, 50% of their time working active deals, and 30% of their time managing relationships with existing customers. If each sales resource closes 20 deals a year worth $50,000 each, the organization would generate $10,000,000 in revenue, while incurring $2,000,000 of expense, resulting in an E/R (expense to revenue) ratio of 20%.

However, by mapping tasks to specialized sales resources, this same organization can achieve a dramatically better result. With the same total headcount of (ten), and assuming the same task focus (20% prospecting, 50% working active deals, and 30% post-sale account management), the organization could instead deploy:

- Two inside sellers for demand generation;
- Five field sellers to manage the deal cycle; and,
- Three post-sales account managers to build and maintain customer relationships

Since inside sales reps and account managers are roughly 50% and 70% of the cost of a field seller on average, producing the same $10M in revenue would cost $320K less to produce, dropping E/R by four points to 16%.

Building the Tactical Coverage Maps

When designing a tactical coverage approach, the typical frameworks used are visual maps that overlay marketing and sales process onto customer segments (rows) and the buying process (columns). Usually, it makes sense to split the marketing and sales processes into two different visual maps—but it's critical to remember that marketing and sales should work in concert. There is already a lot of information defined for each row:

- From the Opportunity Mapping section, you will have a clear understanding of the product / solution to be sold;
- From the Within-Account Targeting section, you will have a solid understanding of the buying, influencing, and technical roles within an archetypical account;
- And, you will have a defined Revenue Motion.

The marketing tactical coverage map (see Figure 12) is usually simpler than the sales map. Generally, the same awareness tactics are used across segments—albeit with different targeting and media budgets. Larger accounts—that generally come with larger transaction sizes—can be targeted with more expensive awareness tactics. Sponsorship of sporting events is a typical awareness tactic for enterprise and larger accounts; online video can now be targeted to executives and decision makers across company size.

Channel Marketing

There are two general approaches for generating leads for/in the channel:

1. Manufacturer-Led: Leads are generated by the manufacturer and routed to different partners depending on capacity and capability. This is typical for very large companies with large marketing budgets. The manufacturer keeps control, and has a better grasp on which partners are handling which account.

2. Partner-Led: In the simpler model, the channel is left to fend for itself, generating its own demand. Smaller companies typically choose this model, but it comes at a cost: Manufacturers have less control over their accounts, and their data.

The demand generation function is where marketing and sales first meet. Typically, marketing generates leads (sometimes called marketing-qualified leads or MQLs), and sales receives them. The best leads are usually driven by engagement with content relevant to a potential buyer with a real need. Deployment tactics for this content can vary by target segment and potential buyer; while LinkedIn seeks to be a universal business social network, its effectiveness varies by industry and role type. More technical roles are more likely to be found on places like Stack Overflow, for example.

Account-based marketing is an integrated digital approach to always-on marketing for different roles in accounts. It is essentially the marketing version of account coverage—but instead of human beings chasing them down, they are digitally covered on web browsers, email clients, and inside of apps.

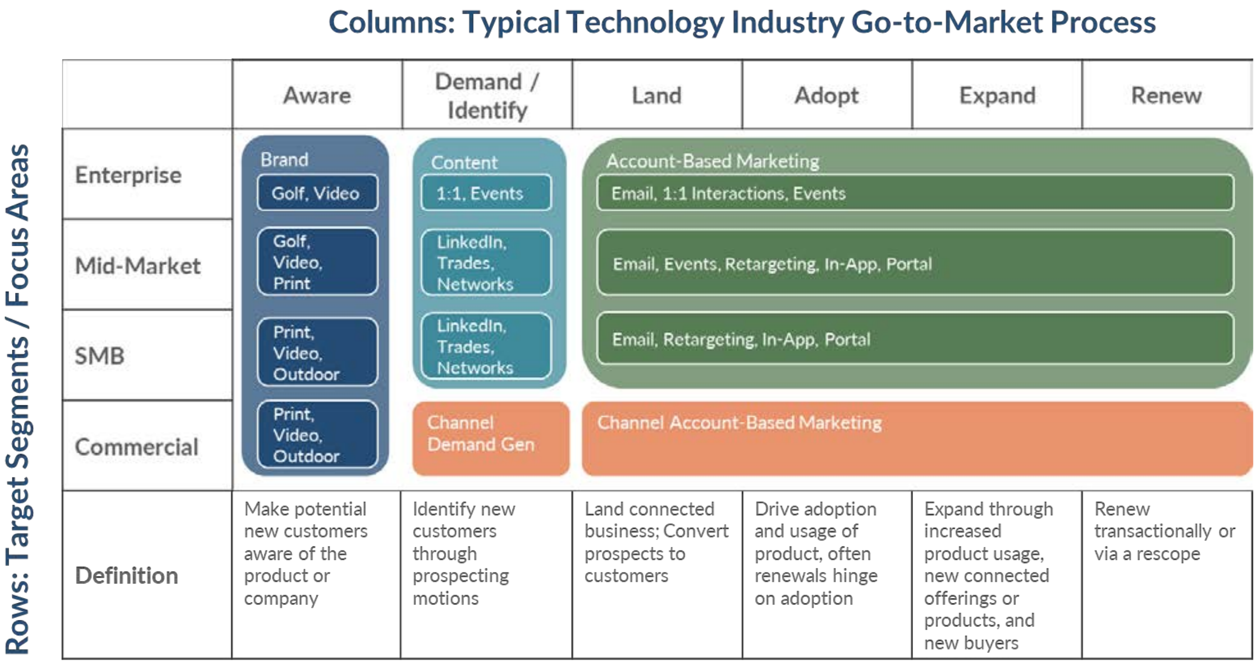


Figure 14: Example Marketing tactical coverage map. In this case, a shared awareness function drives demand across target segments, but the channel is left to handle demand gen and account-based marketing. Single, integrated content marketing and account-based marketing functions handle all direct sales segments (albeit with different channel and targeting approaches.)

The sales tactical coverage map (see Figure 15 below) is generally more complex. This is where different roles—selected based on cost, efficiency, and capability, as discussed above—are mapped to different parts of the buying cycle.

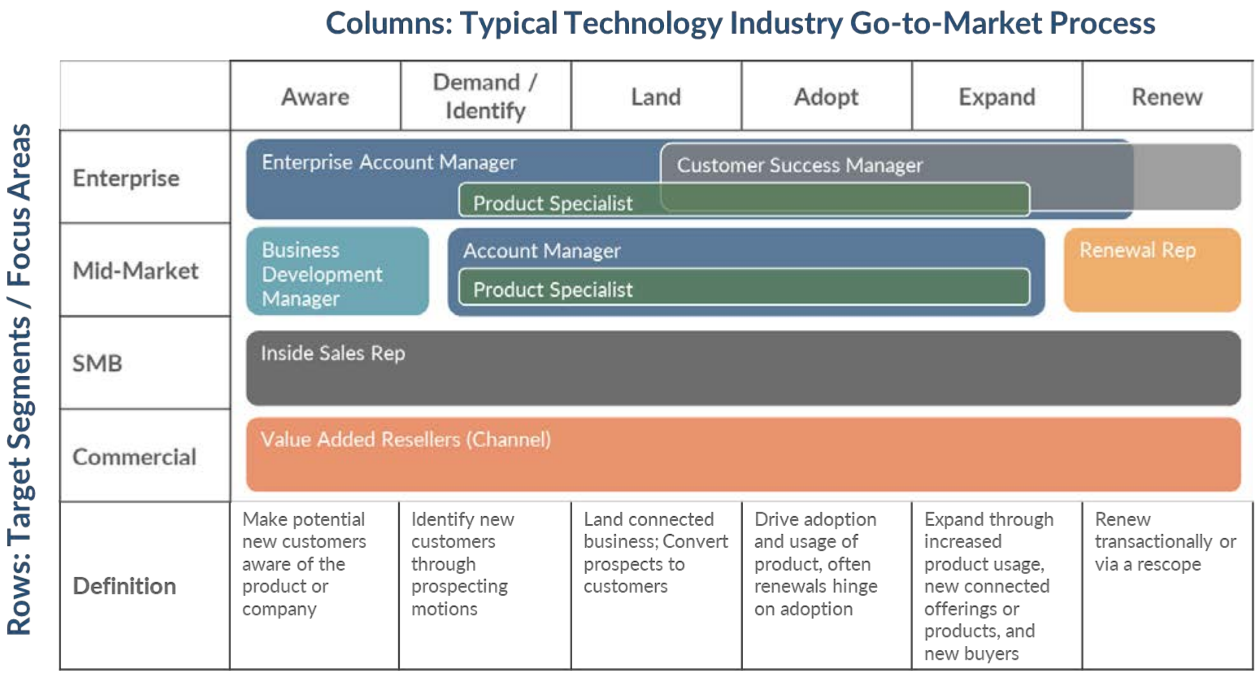


Figure 15: Example Sales Coverage Map for Three-Segment Technology Company

In conclusion, coverage models help organizations optimize profitable revenue generation while maintaining a best-in-class customer experience. Strategic coverage design involves choosing between direct and indirect channels, while tactical coverage design focuses on mapping customer touchpoints with specialized resources throughout the sales process. Balancing channel preferences, role capabilities, and economic efficiency is critical to designing a successful coverage model. Ultimately, a well-designed coverage model enables organizations to efficiently allocate resources and deliver superior value to customers.

Role Design

Each customer-facing role has its own job-to-be-done, which demands unique strengths, skills, and economics. Effective roles are mutually exclusive and collectively exhaustive (MECE). They have minimal to no overlap (mutually exclusive) and together address all coverage needs (collectively exhaustive.) While every organization will have unique B2B coverage roles, the below starter lists of sales and marketing roles—which roughly correspond to the sample tactical coverage map above—is a helpful starting point.

Sales Roles

The **Account Executive** is responsible for selling a company's products or services to businesses or organizations. They focus on building relationships with customers, identifying their needs, and proposing solutions that meet those needs. They manage most relationship building, stakeholder navigation and deal making during the sales process. They are also often responsible for maintaining relationships with existing customers and generating repeat business.

- 5+ years of experience
- $250-$500K OTE

The **Product Specialist** is a pre-sales role responsible for having in-depth product specific conversations with customers, acting as the subject matter expert for a given product category within a portfolio. This depth of knowledge allows them to communicate specific product value. They work closely with sales teams, providing technical knowledge and expertise.

- 5+ years of experience
- $150-$300K OTE

Sales Engineers are similar to Product Specialists, but are more technical. They provide engineering support, including light coding and customization. The best Sales Engineers create custom demos that turn into real solutions, providing critical use case-based proof points.

- 5+ years of experience
- $200-$300K OTE

Solutions Consultants work after the sale to make sure that products and solutions work and are used. They troubleshoot problems, and like Sales Engineers, provide light coding and customization. Solutions Consultants can stay aligned to accounts for years, ensuring renewal and satisfaction. In some organizations, the Product Specialist, Sales Engineer, and Solutions Consultant roles are merged into two or one technical roles.

- 5+ years of experience
- $200-$300K OTE

Customer Success Managers are a post-sales role responsible for ensuring customer satisfaction, driving utilization, and confirming value realization. They work closely with customers to understand their needs, provide ongoing support and guidance, and help them achieve their goals. They also work closely with sales teams, ensuring that customers are renewing their contracts and generating repeat business.

- 2+ years of experience
- $80-$200K OTE

Business Development Representatives (BDRs) or Sales Development Representatives (SDRs) identify and qualify new business opportunities. They work closely with sales and marketing teams to generate leads, and set up meetings with potential customers. For new logos, these resources are typically the first point of contact with a customer, qualifying opportunities for budget, authority, need, and timing (BANT).

- Entry level
- $50-$150K OTE

Customer Service Representatives provide support to customers who have questions or issues with a company's products or services. They answer questions and issues in a timely and professional manner. They are also a key conduit of bug reports and enhancement requests for the product team.

- Entry level
- $40K-$100K OTE

Marketing Roles

The Marketing Manager is responsible for creating and executing marketing strategies that drive brand awareness, generate leads, and support the sales process. They oversee the development and implementation of marketing campaigns, manage budgets, and analyze marketing performance data to optimize strategies.

- 3+ years of experience
- $100-$150K OTE

Content Marketing Specialists create and distribute valuable, relevant, and consistent content to engage and educate target audiences. They craft and manage content such as blog posts, whitepapers, case studies, and webinars that showcase the company’s expertise and address customer pain points.

- 2+ years of experience
- $50-$100K OTE

Digital Marketing Specialists drive online visibility, traffic, and leads through digital channels such as search engines, social media, email marketing, and online advertising. They manage and optimize campaigns, analyze performance data, and make data-driven decisions to improve marketing effectiveness.

- 3+ years of experience
- $75-$150K OTE

The **Social Media Manager** is responsible for managing and growing a company's presence on social media platforms. They create and curate content, engage with followers, monitor conversations and trends, and analyze performance data to drive brand awareness, build relationships, and generate leads.

- 2+ years of experience
- $50-$125K OTE

Event Marketing Coordinators plan, organize, and execute events that promote the company's products and services. They manage event logistics, develop promotional materials, and coordinate with internal and external stakeholders to ensure successful events that generate leads and build brand awareness.

- 2+ years of experience
- $80-$100K OTE

Marketing Automation Specialists configure, manage, and optimize marketing automation platforms, including account-based marketing (ABM) systems. They set up and manage email campaigns, lead nurturing programs, lead scoring, and other automated workflows that support the sales process.

- 3+ years of experience
- $80-$150K OTE

The **Demand Generation Managers** create and execute strategies that generate high-quality leads for the sales team. They work closely with sales and marketing teams to align efforts, optimize lead sources, and improve lead quality through data-driven decision-making.

- 2+ years of experience
- $50K-$100K OTE

Channel Marketing Managers develop and execute marketing strategies that support and drive the success of the company's channel partners. They create marketing materials, coordinate joint marketing efforts, and provide training and support to ensure partners effectively promote the company's products and services.

- 3+ years of experience
- $80-$150K OTE

Organizational Structure

Strategies need structures to operate. The structure of a B2B go-to-market is hugely predictive of its success. Organizations with many siloed teams—particularly sales and marketing—tend to operate in those silos, regardless of stated strategy. Geographically separated organizations tend to be geography-centric—even if sales territories are realigned towards industries.

Organizational structure can be broken down into two parts. First, the overall design of the organization is concerned with the roles, reporting structures, relationships, and specializations that will execute the go-to-market strategy. Second, capacity planning determines the right number of people that will be required to execute revenue motions in quota-bearing roles.

Organizational Design

A go-to-market organizational design defines the hierarchy of roles and functions within an organization that will operate in pursuit of revenue growth. A well-designed organization should:

1. Reflect the overall go-to-market strategy
2. Share common goals, targets and KPIs
3. Provide clarity and focus on jobs-to-be-done
4. Reduce friction between teams and individuals

Structural Dimensions

There are four basic structural dimensions for a commercial organization: geography, product, segmentation, and function. Typically, organizational structures mix two or more of these dimensions in a matrix—but the simpler the better. There is no one best structure for B2B go-to-market; each company's decision will depend on the nuances of their GTM strategy.

The **Geography dimension** aligns sales teams to location-based territories. This structure is particularly effective for companies like medical device and pharmaceuticals where face-to-face interactions with locally based clients (Physicians) are critical. Generally, marketing teams are not geographically focused.

Pros:

- Sales teams can develop strong relationships with local customers
- Better understanding of local market
- Easy to manage and monitor performance in each region

Cons:

- Often difficult to account for large enterprise customers who also have large geographic footprints
- May not be effective for companies with products or services that are not region-specific

The **Product dimension** aligns sales and marketing teams to the products or service lines within a company's portfolio. Each marketing and sales team is responsible for marketing and selling a specific product or service, regardless of the geographic location or customer segment. This structure is particularly effective for companies with a very diverse product portfolio, where each product has unique value propositions and very different buyer sets—usually in different accounts altogether.

Pros:

- Sales and marketing teams are experts in specific products or services

Cons:

- May result in competition for similar budgets
- May be difficult to communicate value of full offering portfolio, resulting in difficulty expanding accounts
- Can become costly when teams become hyper-specialized

The **Segment dimension** aligns go-to-market resources to customer segments (Large Enterprise, Middle Market, Small Business), or specific industries. This structure is effective for large enterprises selling to a range of very large to small enterprises.

Pros:

- Transaction economics easier to align, as more resources can be focused on larger accounts, and vice versa
- Better understanding of customer needs and preferences—particularly inside of industry verticals

Cons:

- Not effective for customers serving a very similar set of customers
- Can be most expensive, particularly if industry vertical focus balloons

The **Functional dimension**—perhaps the most common—organizes resources based on what they do, such as customer success, account management, channel management, or business development. In many cases, this is the matrix layer that is crossed with one of the above three dimensions. For example, a Function-Segment matrix is an extremely common structure for B2B technology companies.

Pros:

- Clear roles and responsibilities for each resource with a minimum of overlap
- Skills aligned cleanly with jobs-to-be-done

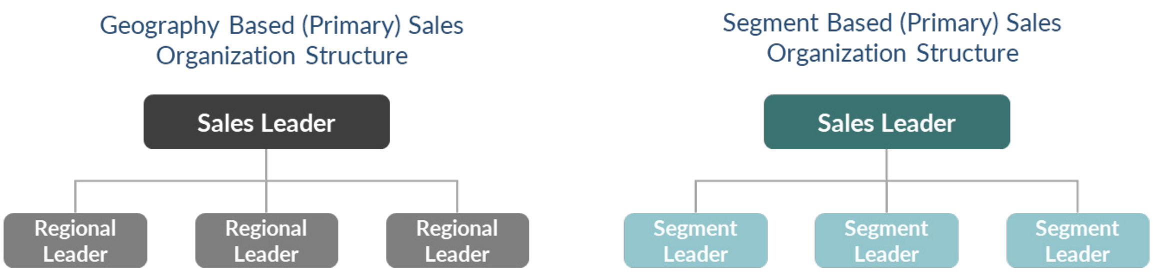
Cons:

- May result in silos or lack of communication between functional areas
- May be too costly for companies with a simple products, and revenue motions

Dimensions to Structures

Go-to-market organizations must typically operate across two or more of the above dimensions, in order to optimize both resource allocation (efficiency) and specialization (effectiveness). However, matrix organizations also drive complexity. In our experience, go-to-market functions are the most often reorganized departments at our clients—a good indicator that the initial structures were sub-optimal, and that it's difficult to get customer-facing organizations structured correctly.

All organizations start with leadership. The hierarchy within the organization should be built around a single senior leader—typically a Chief Revenue Officer (CRO). The CRO should have direct oversight of all dimensions. For example, if a go-to-market organization is primarily organized by vertical and by function, all vertical leads and function leads should report directly to the CRO. Adding another layer between the vertical and function leads and the CRO might seem to make sense, but it can lead to siloing.



Typically deployed against:

- Channel based segmentation and sales motions
- Less complex accounts
- Local buyers / decision makers

Typically deployed against:

- Discipline and sales motion informed segmentation
- Complex account hierarchies
- Centralized buying decisions for strategic solution selling

Figure 16: Example organizational structures

In a matrix organization, a vertical lead (say, a Vice President) will have to work with functions. For example, say the Life Sciences Vertical VP needs to execute an integrated marketing campaign. She will need to have close relationships with the VP of Demand Generation, and looser relationships with data science, marketing automation, and other roles and departments. Some organizations choose to formalize these relationships with "dotted line" reporting; however, we have found that these secondary reporting structures end up adding meeting volume, but do not add to effectiveness. Instead, executives should focus on open communication lines.

Go-to-market organizations have traditionally struggled with communication and collaboration, for a few different reasons. First, roles are traditionally compensated and evaluated based on revenue production. This can drive "zero sum game" thinking—even at senior levels. While it's easy to repeat mantras about teamwork, the reality is that sales executives, in particular, are competitive and self-motivated.

Secondly, go-to-market organizations tend to be geographically distributed. Even before Covid and the era of remote work, revenue organizations tended to have less face-to-face contact with one another. In a real sense, sales teams were remote before everyone else was. Sales managers have known for decades that bringing distributed teams together physically a few times a year drives massive intangible benefits.

Customer-focused cross-functional forums are a good way to address communication issues. Instead of an endless string of update and status meetings, assemble diverse teams from across marketing and sales to share customer challenge and success stories, and work together to solve them. By reversing the lens from internal to external, walls break down. These forums are similar to engineering teams performing code reviews and demos in an agile process; by focusing on the work and not the bureaucracy, productivity surges.

Organizational Structure Best Practices

- Keep Matrices Under Control: Focus on two dimensions at most: Product / Vertical; Function / Segment; etc.
- Single Revenue Leader: One Chief Revenue Officer
- Flat Organization: CRO has direct reporting relationships to segment, function, geography, and/or product leads (e.g., the Life Sciences VP; no Vertical Market SVP)
- Minimize Dotted Lines: Instead, focus on communication and relationship-building
- In-Person Collaboration: Customer-focused forums where interdisciplinary teams work customer issues

Capacity Planning

While organizational structure functions as the skeleton of the go-to-market organization, capacity planning adds muscle. Capacity planning involves forecasting the number of resources—direct sellers in a direct model or partners in a channel model—required to meet targets. Fundamentally, commercial capacity planning helps organizations understand how to systematically scale their teams, determining how many people to hire or partners to recruit, and when to do so. This allows companies to meet and potentially exceed their growth objectives. Done correctly, annual capacity planning offers a predictable, repeatable, and objective resource management framework, serving as the basis for hiring and partner recruitment decisions.

A capacity model is an Excel spreadsheet that reflects the dimensions of the organizational structure of the business. For example, column A might contain vertical industries; column B might contain account sizes, and column C might contain product types. Revenue growth targets are then populated for each cell. Typically, this is done by using historical revenue by cell, and multiplying by a growth factor.

Growth factors require alignment on growth targets. This exercise is typically driven top-down by finance and is the subject of much negotiation with the go-to-market team. For a large organization, a 10% growth target is a much bigger stretch than a 5% target. One truism is that growing 10% will require more than a 10% increase in resources—it might require a lot more—but we will cover that later.

With these revenue growth targets, it is possible to use productivity targets to estimate the number of Account Executives, partners, sales specialists, or any other variable resource required to deliver the revenue target. Capacity planning is thus a linear, financial exercise—albeit with significant complexity baked in due to the number of dimensions and roles that must typically be accounted for.

Capacity modeling should extend beyond direct sales resources. While direct quota carriers are often the anchor of the model, it is important to factor in the requirements for and cost of various overlay/support resources. Simple headcount ratios can be useful in this exercise. For example, an AE might typically require 0.3 Sales Engineers, 0.4 BDRs, and 1.2 Customer Success Managers. Getting these ratios or multipliers right is beyond the scope of this paper, but suffice to say it requires both benchmarking other organizations—and assessing success (or lack thereof) internally.

Non-linear effects definitely come into play. In 1975, Fred Brooks wrote The Mythical Man Month, essentially showing that adding resources to engineering projects does not produce a corresponding increase in productivity. The same thing can be true of sales teams. While it might be tempting to think that as organizations get bigger efficiencies will come into play—sometimes the opposite happens. Put another way, large sales organizations can be less productive in terms of revenue driven per FTE (full-time equivalent—an acronym often used in capacity planning.)

Some of this is driven by the inevitable impacts of ramp time and attrition. It takes at least six months for a sales rep to reach their initial productivity plateau—and then typically years before they reach their full potential. It just takes a long time to learn accounts and the business. Attrition can also hurt sales productivity; when veteran leaders leave for competitors, there is negative impact not just on their own territories, but on the network and mentoring impacts they have on younger sellers.

The same is true for partners. Good partners are hard to find, and take a long time to become productive. Typically, partner quality and productivity follow an exaggerated pareto curve, with 10% of the partners driving 90% of the value. When it comes to capacity planning, this means that assuming a new partner will have "average" productivity is almost certainly incorrect. It might take ten new partners to get to the average productivity of the current partner landscape.

One helpful way to think about ramp speed and non-linear effects is to estimate fully ramped yield per headcount or partner. While tempting to use a point estimate, looking at productivity per resource over time can provide a statistical distribution, which tends to be lognormally distributed. There will be some mean productivity level, many resources who are below this mean, and a few who are much higher. The mean can be used as a fully-ramped yield, but it is even more helpful to understand the factors that drive yield—typically tenure being the most important. A tenure-yield curve can make capacity planning much more realistic.

Account differences can also make capacity modeling more complex. Historically difficult accounts can require more resourcing—or might potentially be dropped from coverage altogether. Similarly to resource productivity, looking at account productivity per year over time can identify both low-performing outliers—and highlight factors that predict low performance. These factors can be re-used from the Segmentation exercise.

Capacity planning postmortems—while often ignored—provide a mechanism for continuous improvement. They should be conducted before the next round of capacity planning. Questions in a post-mortem should include:

- Were the targets realistic?
- Did onboarding and productivity ramping take longer than we thought?
- Did any best practices emerge over the year that made resources more productive?
- Were there any productivity sinks that emerged over the year that made resources less productive?

Conclusion

Building a go-to-market strategy can be a reproducible, scientific exercise. By using data and inference, following a clear process, and carefully selecting and deselecting growth areas, organizations can develop a targeted and effective go-to-market approach. Ensuring clarity about which channels cover which opportunities and creating agile, integrated organizations further enhances the likelihood of success.

A data-driven, systematic go-to-market strategy not only optimizes resource allocation but also enables businesses to adapt to the ever-changing B2B landscape. By fostering cross-functional collaboration, prioritizing customer success, and embracing continuous improvement, organizations can build a sustainable competitive advantage and drive long-term growth. In a world where change is the only constant, a well-designed and executed go-to-market strategy is essential for organizations to thrive and succeed in the marketplace.

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[1] *Salesforce.com "State of Sales", 7th Edition; https://www.salesforce.com/content/dam/web/en_us/www/documents/research/State%20of%20State%20-%205E.pdf (page 21)*

[2] *Ron Miller, "HubSpot's new end-to-end sales hub aims to simplify CRM for midmarket customers," TechCrunch, September 22, 2020; https://techcrunch.com/2020/09/22/hubspot-releases-new-end-to-end-sales-hub-to-simplify-crm-for-mid-market-customers/?wvideo=fc3bpl0%20dj4&reviews_page=3 (page 23)*

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