FRONTLINE selling®

THE MOST EFFECTIVE WAY TO ENGAGE YOUR B2B BUYER

Staccato™

As part of your Staccato Autopilot engagement, FRONTLINE Selling provides the MI Recap as a value-added service. This summary will help you gain insight into how your value proposition resonates in a specific target market and will also help you garner customer data. If you have any questions, please contact your FRONTLINE Selling Demand Creation Executive listed below.

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Background Information: Using the Staccato methodology, I reached out to Paul Yarmsouth, CEO; Ken Larms, CMO & Carlton Bowers, SVP of Global Sales at XYZ and explained the purpose of my call: to discuss helping XYZ accelerate revenue by more effectively engaging with B2B buyers. After speaking with Carlton, I explained the purpose of my call, he asked me to email him some information to review and propose times in the first week of January. Upon my follow up, we agreed to a Meaningful Interaction for Thursday / January 3, 2019 / 11:00 EST. Please join me on the bridge 5 minutes prior.

Additional Information: XYZ provides software services to a variety of industries, with a singular focus on helping small and medium sized businesses more easily connect and engage with their customers. Our proprietary platform allows employees in all departments to open the lines of communication with customers and provide advice, solve challenges or route them through the platform to other departments and roles.

Agenda:

Introductions
Roles and responsibilities of the Key Player
Learn the Key Player environment/business pains
Overview of solutions
Discuss next steps

Attendees: **Client Sales Executive:** Ben Elrod
Prospect Key Player: Carlton Bowers / SVP, Global Sales / XYZ, LLC
FRONTLINE DCE: Daniel Silva

MI Summary: **Daniel:** I'm glad that we were able to get together this morning. I know we had penciled in about 20-30 minutes. I just want to make sure that still works with you and if you had a hard stop or anything we need to know about.

Carlton: No, I'm good.

Daniel: Great. Well, what I'm going to do, Carlton, is I'm going to go over a few things first. I'll make introductions and then we can go ahead and get started with the call. As I mentioned in my invite, I've asked a colleague of mine to join us on our call today. His name is Ben Elrod. Carlton, Ben is actually going to lead our discussion today, as he has more in-depth knowledge on how we can help XYZ more effectively engage your business-to-business buyers. He'll lead discussion today and really any follow-up conversations you guys might have should you agree to set up a secondary call. My role in today's call is, I'm just going to be in the background recording some discussion points really to provide us a recap of our conversation. We are using a bridge line to bring everyone together. I'm going to send you an email in just a second with that information. Just in case you get disconnected, you're more than welcome to call back in. Without further ado – again, appreciate your time today – let me introduce you to Ben Elrod.

Ben: Daniel, thank you for the introduction. Carlton, good morning. It's a pleasure to have the chance to speak with you.

Carlton: Good morning.

Ben: Really, the two-fold purpose in today's conversation, Carlton, I'd like to get a good understanding of how your sales organization is set up from a go-to-market perspective and how you're going after new clients and new revenues to grow the business, and on the other side of that, to give you a good, clear understanding of how FRONTLINE partners with groups like XYZ to drive revenue growth. Like Daniel mentioned, if we determine there are some points of alignment here more towards the end of the conversation, we can pin down what makes most sense as next steps. Does that meet your expectations for the conversation today as well?

Carlton: Yes.

Ben: OK. Perfect. If you could, give me a sense operationally how the sales group is set up and how you're going after the market today, if you wouldn't mind.

Carlton: We have a small internal team in place. Currently we have account reps who focus on growth within existing accounts, and BDR-types who focus on new logos. We are looking at options as to how to maximize the efficiencies of both areas.

Ben: Got it. Is that the go-forward model, or are might you look to add reps or supplement the work your team is currently doing?

Carlton: Well, before we treated all account reps as both hunters and farmers, but we are looking to split that up into 2 roles, because it really just makes more sense. The hunters have a certain mentality, passion and expertise in uncovering new accounts, where the farmers are highly skilled in nurturing. Trying to have one role do both jobs isn't working.

Ben: Yes. That makes a lot of sense to consolidate focus. So, in the hunter group in particular, they'll be driving all the net new business. What kind of support is in place today with that group? Is there a lot of marketing support? If you could, maybe give me a sense of that side of that environment.

Carlton: We are definitely having to make some adjustments in our process moving forward. Our farmers have their set of accounts, with specific growth targets associated with both the accounts and the portfolio overall. For a new logo rep, those guys have obviously whatever targets they're working. From there, we generate quotas. From a marketing perspective, we're changing our marketing strategy- well, more like creating one since we have never had one. We are trying to change the perspective of how the company is viewed because at this moment, it's pretty confusing. If you view our website, you don't come away from a good understanding of what we do.

Ben: Got it. That makes a lot of sense. From a sales perspective, is it broken down into regional territories?

Carlton: Directionally yes, but not exactly that way.

Ben: OK.

Carlton: The way the company was set up before previously was that the sales organization was based in Akron, which I think is horribly structured and inefficient and not the way you should go to market.

We had good customers in other places, but it's just that we don't necessarily have reps that support them exactly as they should because they're not local and not close to those markets. We'd like to have more reps closer to their clients to provide a higher level of service. That makes sense to me but it's been historically challenging for us to make that work.

Ben: Right. I appreciate the context. Let me do this, Carlton, just to take a step back and give you a sense of exactly where we fit here in the market and then a couple of questions that we can dig into from there. Our founders were both former enterprise sales executives. They built the business just over 16 years ago and they had identified just a common challenge across multiple markets, different verticals and regional demographics. The challenge is that there's a lot of smart, dedicated sales people that continually struggle with being able to get in front of the right people and the right target accounts to drive consistent new sales opportunities. There's a small select few that are just naturally able to do this really well, but a vast majority of dedicated, smart reps that have a lot of difficulty in this particular area.

They conducted a study of 1.8 million outreach efforts to identify what it is exactly that the people that are doing this really well are doing differently than everybody else, so through that base of study, they found the answers to questions around what the most effective way is to engage with business-to-business buyers. They took all of those findings from the research and refined them into a process and methodology that we call Staccato. It's all focusing on top-of-funnel engagement and getting engaged with the right people and right target accounts. There are couple of ways that we take that to the market. On one side of the business, we do this as a managed service working in tandem with our client's resources, so we become an extension of your team and do the lead generation piece of the efforts to support sales on your team's behalf working closely with them. On the other side, we have a sales training and sales software side of the business.

(…Additional conversation removed for purposes of this example...)

Ben: It sounds like there's a lot on the table of things that you're doing to improve. The website rolls out on the 15th, so least from a perception to the market, there's a base there from getting people to move from interest to later-stage cycles. We're in your area and we'd be more than happy to find some time in person, but I think it might be helpful to go through a couple of fine points. I know that we're up to the bottom of the hour on timing, so if we were to look at maybe next Tuesday, would there be a good time to come back for 30 minutes and maybe pin down some details?

Carlton: Maybe next Thursday around 2:30 would work.

Ben: Great, that works for me as well. I'll send you a note to where you have my contact and a placeholder on the calendar for that time. We can pick up the conversation then.

Carlton: Sounds good.

Ben: Well, I enjoyed the opportunity to make introductions, Carlton. We'll look forward to going back a little bit further into areas. Enjoy your upcoming weekend. I'll send you the note, and we'll look forward to picking up next Thursday.

Carlton: Sounds good.

Ben: Alright. Thanks.

Next Steps: Ben will send Carlton a calendar invite for a more in-depth conversation scheduled for Thursday / January 17, 2019 / 2:30 EST.

Qualification: **Qualified Sales Opportunity**