

# Point of View for Leading Data Provider

July 2024



# Industry trends

## GenAI

*Dominating the technical and product agenda of every tech provider*



*Transition from hardware to subscription / consumption model*

*Efficient growth eclipsing "growth at all costs" mindset challenges historical operating model*

*Expanding service offerings business and technical demands challenge enterprise IT ability, creating new opportunities*

**80%**  
*of B2B sales interactions will occur on digital by 2025*

## 2024 Tech Provider Top Trends: *Precision Marketing and Sales*

Rapidly evolving tech advances are resetting expectations for sales and marketing as buyers look for deeper and more meaningful engagement from tech providers.

Tech providers failing to adapt to new trends will see the erosion of deal quality and loss of relevance.

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# Industry challenges

## *Complex global distribution models*

*work across ISVs, resellers, and GSIs to support complex multi-country / product deployments*



## *Blurring lines*

*Partners can become competitors in other verticals*

## *Subscription & consumption*

*based models give customers more agency and control over price*

## *Sprawl of purchased / homegrown IT*

*systems that don't talk to each other limits GTM team agility*

## *Upskill the GTM team*

*sellers and partners must become experts in AI, edge and hybrid cloud*



## *2024 Tech Provider Top Trends: Rising Buyer Pessimism*

Tech providers have observed negative sales pipeline due to new buyer behaviors colliding with outdated GTM models.

Without adapting sales and marketing approaches tech providers will see their own GTM operations decline

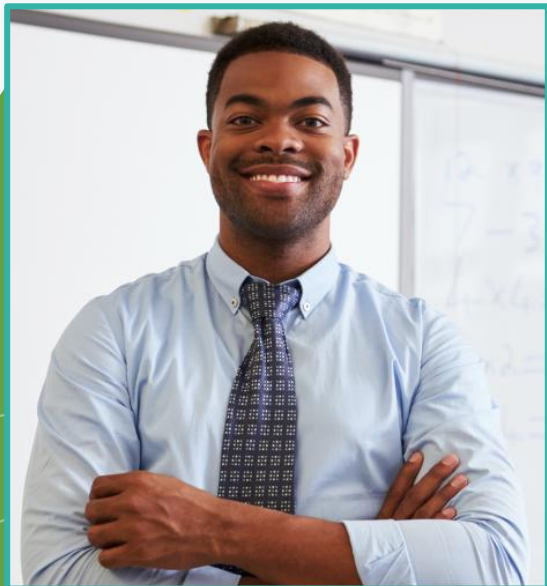
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Leading Data Provider key strategies:

Focus on value creation, enhanced technology and data, solution innovation and a client-centric go-to-market strategy.



Enhance existing client relationships and drive cross-selling



Leverage best practices from serving the current customer base, and articulate the value to similar companies



Expand in the SMB market



Expand presence in attractive international markets and move international revenue beyond 30%

# Our partnership priorities



Enhance existing client relationships & drive cross-selling



Leverage Leading Data Provider's extensive data to deliver proactive and personalized customer experiences that drive revenue creation

Articulate value to target customer verticals



Deploy, scale, measure, and refine targeted prospecting plays to build pipeline in core segments

Expand in the SMB market



Maximize rep efficiency and effectiveness in a wide and constantly-evolving prospect base

Expand in attractive international markets



Centralize global GTM strategy, while adapting regional messaging and customer data usage for various international landscapes



## Our use cases to explore

Deliver proactive and personalized customer experiences

Deploy, scale, measure, and refine targeted prospecting plays

Maximize rep efficiency and effectiveness

Centralize the core GTM strategy & adapt for international landscapes

— Tech and process consistency —

— Salesforce data and visibility —

Tech Stack  
consistency

GTM  
consistency

Reporting  
visibility  
with Salesforce as the  
source of truth

Coaching  
visibility  
On new hire ramp and  
deal management

Internal and partner  
signal capture

Custom plays from data  
signals

Automated activity  
capture

Conversation intelligence  
and deal dashboards

Centralized workflows  
across channels

Structured sales  
frameworks

Cadence reporting in  
Salesforce dashboards

Outcomes reporting for  
full-cycle performance

Automations in seller  
workflows

Structured sales  
frameworks

Contact information  
updates for data quality

Coaching dashboard

Compliance with  
international data  
requirements

Adaptable governance  
frameworks

Drill-down reporting

Adaptable KPIs per team  
and rep

# Point of View for Leading Data Provider

July 2024



We will improve process guidance, pipeline visibility, and buyer-centric selling in Leading Data Provider's enterprise expansion efforts, driving towards **\$10M-\$16M in incremental revenue**

## Goals

Enhance client relationships and drive cross-selling across a \$200M install base

## Focus areas:

Expand time horizon on renewal activity

Build a trigger-based environment

Improve pipeline visibility

Improve process consistency with next-best action guidance

Codify proactive account management

Drive workflow efficiencies and guide seller renewal efforts to improve proactive account management

Prioritize based on triggers

Incorporate data signals as inputs for improved prioritization

Improve pipeline visibility & inspection

Deploy customizable opportunity dashboards with drill-down into activity records

Guide the next-best action with signals

Leverage conductor AI to translate insights from signals into seller action

## Our Solutions:

↑ Account touches  
↑ Retention

↑ Risk identification  
↑ Upsell pipeline

↑ Forecast accuracy  
↓ Seller ramp time

↑ Process execution  
↓ Seller ramp time



We will improve efficiency, prioritization, and collaboration, driving market coverage and qualified opportunity generation past this year's target of 5% pipeline growth

Goals

Focus areas:

Our Solutions:

Drive net-new pipeline and revenue creation

Enhance existing client relationships and drive cross selling

Unlock productive capacity for pipeline generation

Prioritize sales efforts based on signals

Facilitate collaboration within selling teams

Structure and manage GTM messaging

Drive workflow efficiencies and GTM agility through automation and adaptable structured sales plays

Embed signals directly into the workflow

Incorporate Leading Data Provider's data, combined with 3rd signals, directly into seller workflows to guide efforts towards the highest-intent prospects

Facilitate information capture and sharing

Capture and analyze customer calls, and simplify opportunity tracking to save time and facilitate collaboration between SDRs, AEs, domain sellers, and managers

↑ Territory coverage  
↑ Touches per account

↑ Prioritization  
↑ Pipeline

↑ Efficiency  
↑ Team insight

We will improve SMB conversion and win rates through consistency, productive capacity, persistence, and signal-led prioritization, generating **\$5M in incremental revenue**

Goals

Focus areas:

Our Solutions:

Expand in the SMB market

Drive consistency of content, talk track, and messaging

Increase account touches for higher win rates and upsell

Achieve actionability from signals  
(Freemium products and propensity to leave model)

Structure and manage GTM messaging

Drive workflow efficiencies, GTM agility, and seller consistency through automation and adaptable structured sales plays

Codify account engagement and persistence

Structure sales plays to increase touches per opportunity, maximizing conversions

Guide the next-best action with signals

Leverage conductor AI to translate insights from signals into prioritized seller actions

↑ Territory coverage  
↑ Lead conversion

↑ Win rates  
↑ Customer LTV

↑ Lead conversion  
↑ Win rates