

# Strategy session

# Here are the most helpful ways to engage in our strategy discussion today:

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## 1 Raise blind spots

What are we not thinking about? When are we thinking too small? Where have you seen this before and what happened?

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## 2 Break mental models

What if we took that to the extreme? What if we did the exact opposite?

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## 3 +1 / Challenge / Next

The hardest part of being CEO is conviction at a crossroads. Help me build it, or challenge it directly with evidence.

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## 4 Tell us how you can help

Sometimes we won't even know what to ask for. Tell us.

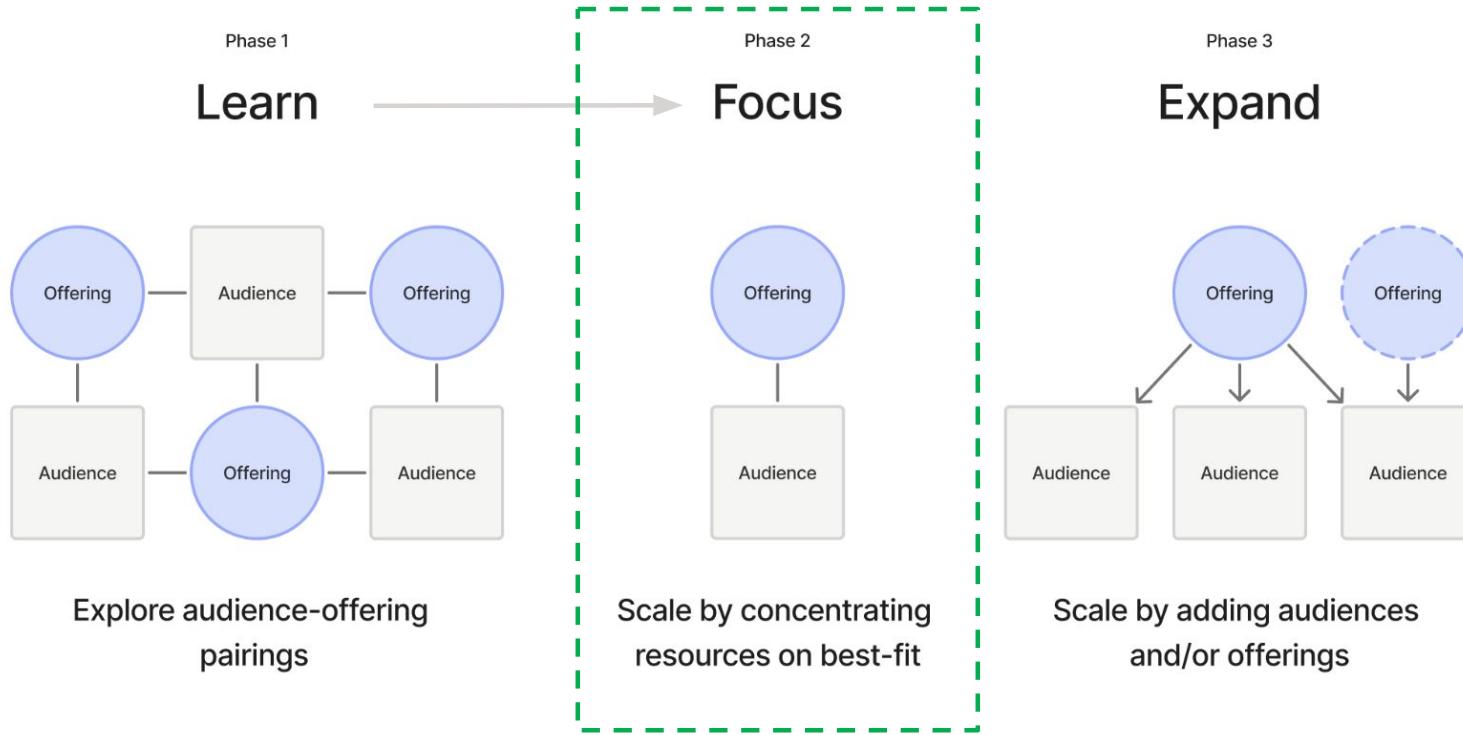
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Note: If we move on for time's sake, please write it down and share it after the meeting.

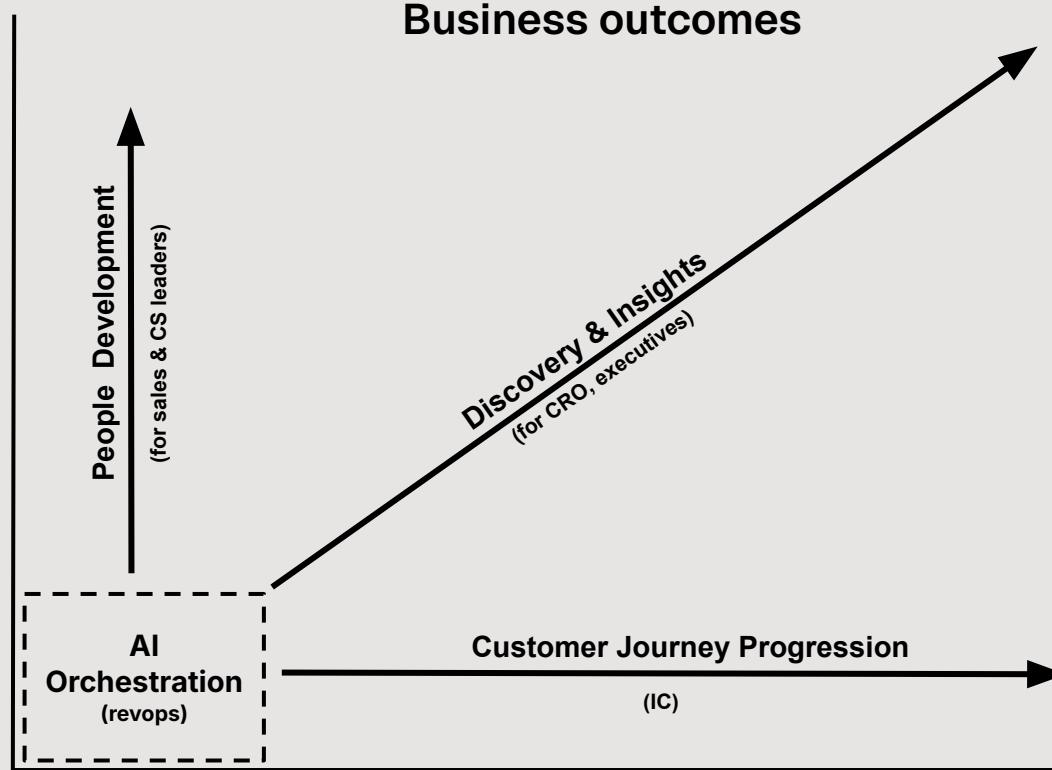
# Marketing strategy

# Entering a new phase: Focus our positioning & messaging

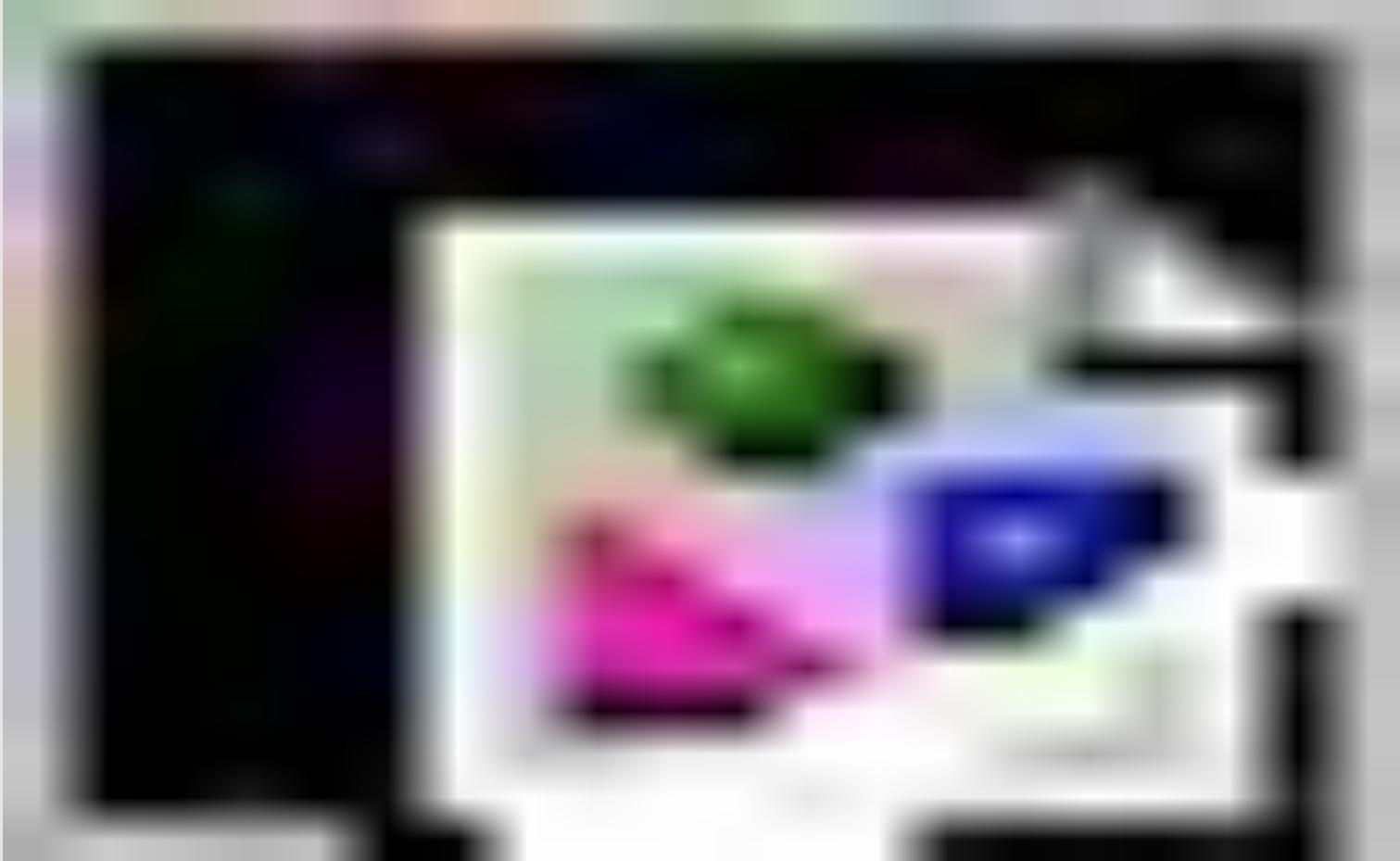
## Startup Growth Phases



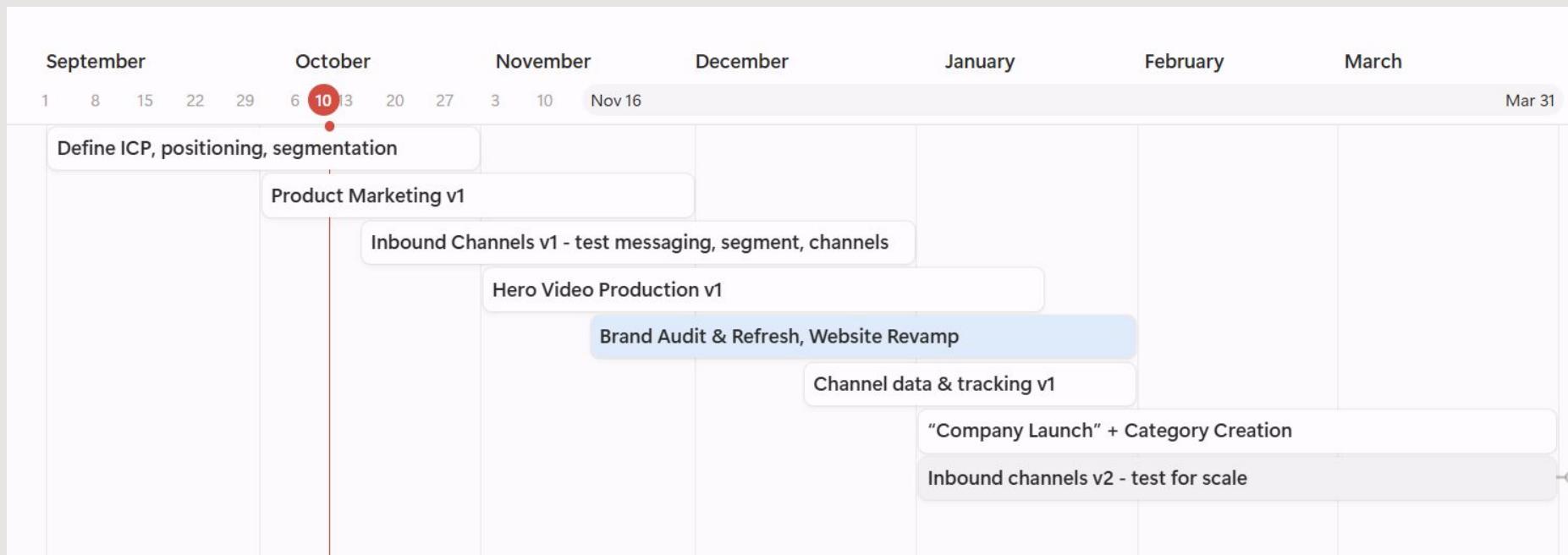
# Simplifying our message: A framework for marketing, product, GTM



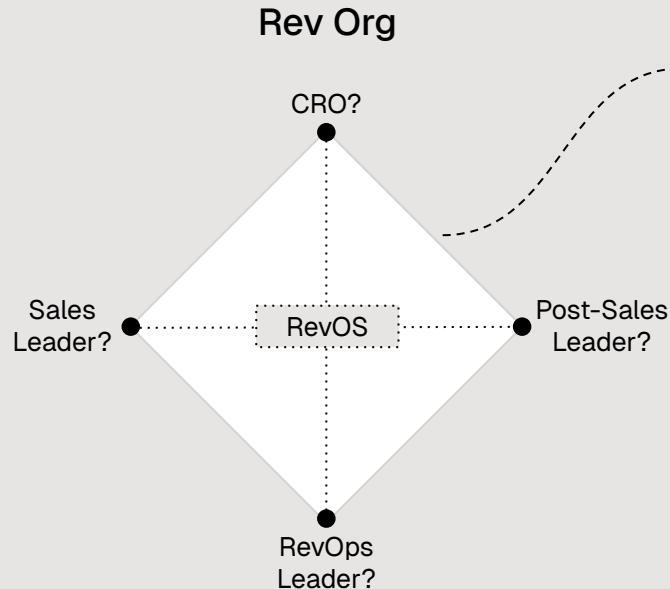
# RevOS | The *Outcomes* System for Revenue Teams



# Roadmap - Lift brand experience to Series A quality and build growth channels



# Who should we sell this to?



## Action item = Test for the best buyer role

- CRO
  - Pro: Should care about the parts of a healthy revenue system
  - Con: Often not close enough to the deep pain that we solve
- Sales leader
  - Pro: Extremely outcome oriented
  - Con: Typically only cares about the first half of the revenue process
- Post-sales leader
  - Pro: Very close to the deepest revenue pain (CS handoff)
  - Con: Dependent on the reluctant sales team for a healthy handoff
- RevOps leader
  - Pro: Feels the pain of each team; technical enough to care about systems, workflows, and AI orchestration
  - Con: Sometimes plagued by tool-overwhelm



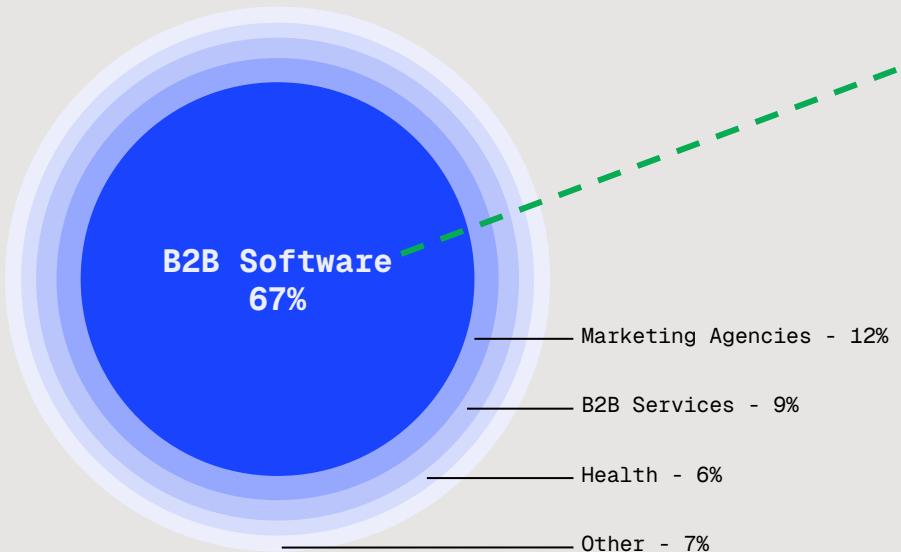
### OUR HYPOTHESIS:

RevOps leaders will be the best fit. Among our top customers, many of the champions are current or former RevOps.



# Accelerate growth by concentrating resources on a narrowed ICP

Share of current ARR:



## ICP Changes:

- Industry/type: [none] → B2B SaaS [added]
- Employee count: 10-500 → 50-500 [edited]
- CRM: Hubspot → Hubspot + Salesforce [edited]
- Team: Has sales & post-sales w/ 5+ [no change]
- AI attitude: [none] → AI-forward [added]

# Product strategy

# VISION

To drive connection and empower humans

## MISSION

AskElephant exists to **empower humans** to be more human—helping people and teams progress toward their best selves by making tools proactive, surfacing what matters, and removing friction from every customer interaction. We foster real connection and impact by enabling teams to focus on what only humans can do: connect, empathize, and create value.

## NORTH STAR METRIC

- Metric: Human Outcomes Orchestrated



STEP 1/5 : THE VILLAGE

# Capture Every Customer Moment

**Confidence:** Users know when events are going to record or not. Users are not surprised when something doesn't show up.

**Full story:** All primary aspects of the customer conversation (ongoing) is captured.

## A. Engagement capture

Effortless record or import, summarize, and structure every call, meeting, and message.

## B. Universal data layer

Aggregate activity from CRM, support, calendar, and messaging tools into one timeline of the customer journey.

## C. Context engine

Enrich each engagement with signals, topics, and intent—fueling AI understanding for downstream actions.



The village

STEP 2/5 : THE VALLEY

# Automate Context Into Outcomes

**Focus:** Bridge the gap between conversations and systems.

**Outcome:** Turn captured context into real actions—without humans logging in.

## A. CRM Agent

Automatically record or import, summarize, and structure every call, meeting, and message. No human effort required.

## B. Integrations Agents (Pipedream)

Expand delivery of outcomes by integrating outside data sources into the agent experience.

## C. Proactive alerts

Surfaces risk or opportunity in real time so the right person acts before revenue is lost.

The valley



STEP 3/5 : BASE CAMP

# Customer Outcome Orchestration

**Focus:** Move from reactive task execution to proactive journey management.

**Outcome:** Connect Sales, Success, and Service through orchestrated handoffs and shared Journey.

Basecamp

## A. Customer journey mapping

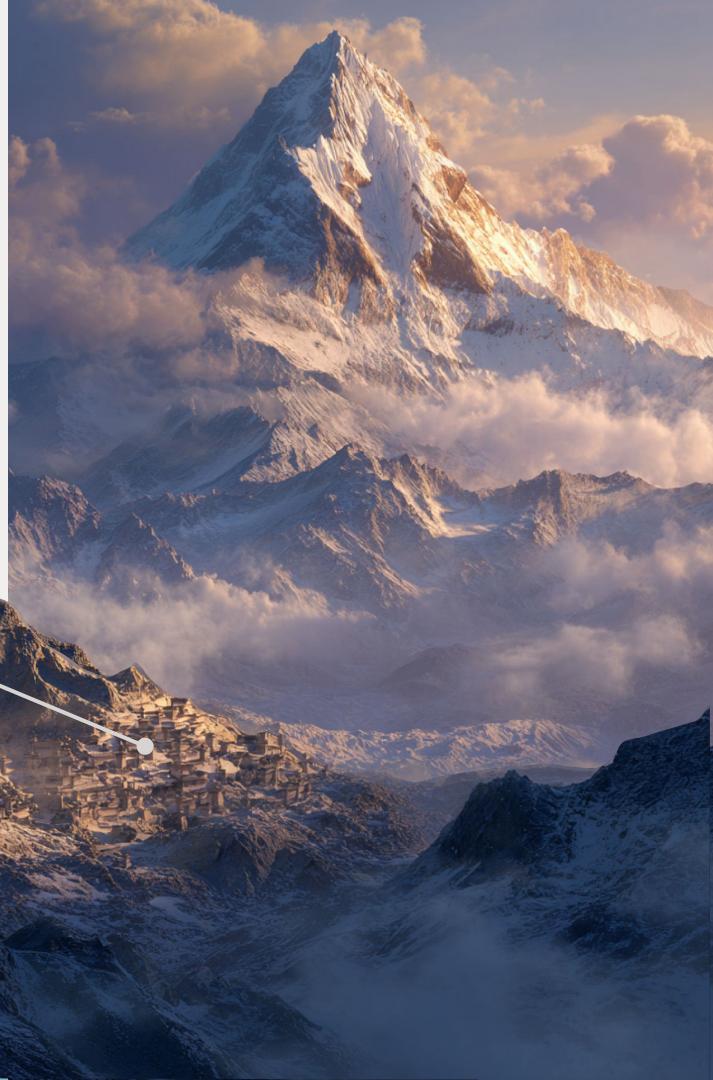
Define every key milestone—handoff, onboarding, renewal, escalation—inside the AskElephant Journey Framework.

## B. Integrated Agent orchestration

Deploy end-to-end experiences throughout each milestone of the journey through multi-agent orchestration

## C. Customizable orchestration framework

Enable customers and partners to orchestrate a customized customer journey experience for their unique business.



**STEP 4/5 : FIRST MOUNTAIN**

# Business Outcome Orchestration

**Focus:** Give leaders visibility and foresight across the journey.

**Outcome:** Transform scattered activity data into predictive, actionable insights.

## A. Leadership journey mapping

Define every key milestone— coaching, win/loss analysis, quality inspection, forecasting inside the Journey framework.

## B. Deepened memory

Insights and actions across the Leadership Journey are stored Month-over-month, Quarter-over-quarter, etc for a continuously evolving system of business outcomes.

## C. Customizable orchestration framework

Enable customers and partners to orchestrate a customer journey experience for their unique business.

First mountain



## STEP 5/5 : MOUNTAIN PEAK

# Empowering Every Team

**Focus:** Make AskElephant the single source of truth.

**Outcome:** Every team connects to the same context, insights, and actions.

### A. Unified record

Central hub where Sales, Success, Support, and Product see the same data.

### B. Cross-team collaboration

Agents coordinate across departments, notifying the right humans when their expertise is needed.

### C. Company-wide intelligence loop

Every action, update, or signal feeds back into AskElephant—making the whole organization smarter and more aligned.

Mountain peak



**STEP 5/5 : MOUNTAIN PEAK**



**STEP 4/5 : FIRST MOUNTAIN**



**STEP 3/5 : BASECAMP**



**STEP 2/5 : THE VALLEY**

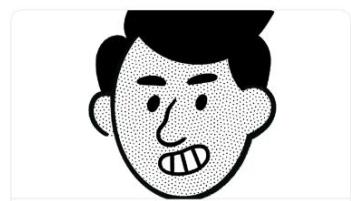


**STEP 1/5 : THE VILLAGE**

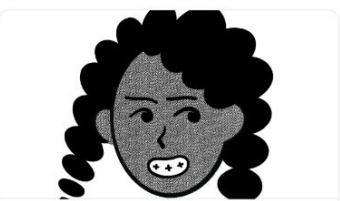


# We know who we are building for!

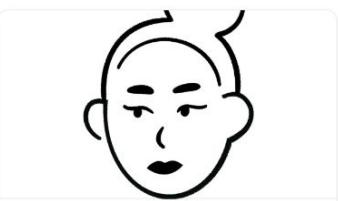
Launched Oct/25



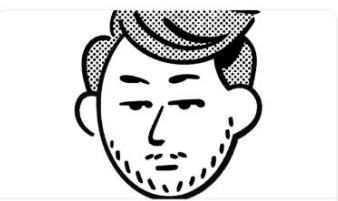
 Aaron  
Account Executive  
Primary



 Celine Dijon  
Customer Success Manager  
Primary



 Irina  
Implementation  
Primary



 Roger  
Revenue  
Primary



 Odis  
Operations  
Primary





## Celine

- Age:** 30-40
- Gender:** female
- Education:** college degreee
- Occupation:** Customer Success Manager (CSM)
- Status:** married
- Location:** UT/SF/NY

### User quote

“How can I keep my customers reaching their goals, not just solving tickets?!”

### Social media

- LinkedIn (primary):** For networking, sharing industry insights, joining CS communities, and following business influencers
- Twitter/X:** For real-time industry news, CS thought leadership, and engaging with SaaS/product communities
- Instagram:** travel pics, food pics
- Slack Communities:** For member-driven, niche conversations in customer success and SaaS
- YouTube:** For webinars, product tutorials, and industry events
- Occasionally Instagram or Facebook:** For staying connected with peers but less frequent for professional development

### Communication

- Channels**
  - Email
  - Slack (or Microsoft Teams)
  - Video Calls
  - Phone Calls
  - Customer Portals/CS Platforms
  - CRM Notes/Task Management
  - Webinars/Workshops

#### Content types/format

- QR Decks/Presentations
- Account Updates/Health Reports
- Meeting Notes/Recaps
- Success Plans
- Playbooks and Checklist
- Customer Stories/Case Studies
- Product Updates/Release Notes
- Surveys (CSAT, NPS)
- Video Snippets/Demos

### Interests

- Staying updated on SaaS and technology trends
- Learning new productivity methods and digital tools
- Personal development (growth mindset, leadership)

## Bio

Celine is a 30-year-old Customer Success Manager at a SaaS company, working remotely across Utah, San Francisco, or New York, with a college degree and a strong technical background as a power user of tools like Gainsight, Totango, Notion, and Google Docs. Married and highly driven, Sally manages a diverse book of customers and is motivated by helping clients reach their business goals—not just resolving support issues. She's valued internally for her data-driven approach, proactivity in account management, and ability to collaborate with teams across onboarding, product, and sales. Celine is laser-focused on customer retention, expansion, and proactively surfacing insights that drive measurable value, but she's regularly challenged by fragmented customer context, juggling dozens of accounts needing personalized engagement, and proving her impact in executive terms. Her north star is using actionable data to prevent churn, trigger the right outreach at the right moment, and ensure every customer journey is seamless from post-sale handoff through ongoing value delivery—so she and her clients can both be seen as success stories within their organizations.

## Pains

### Pain points

- Lack of consolidated, actionable data from sales and onboarding results in customer context gaps and missed expectations.
- Juggling a high volume of accounts makes it difficult to provide personalized engagement for each customer.
- Struggles to quantify and communicate the purpose of their role to executive stakeholders and their strategic benefit

+ Add pain

▶ Tip

## Fears

### Frustrations and fears

- Fear of unexpected churn due to missed risk signals or incomplete account context or being held accountable to a situation they have no control over i.e. layoffs
- Frustration with siloed or non-integrated tools leading to manual effort and workflow inefficiency
- Anxiety about being perceived as “support” rather than a trusted, strategic advisor and long term planning partner
- The business does not see them as a valuable asset
- Fear of not having family time

+ Add fear

▶ Tip

## Needs

### User core needs

- Seamless access to unified customer context and actionable insights throughout the customer journey
- Tools that automate routine tasks, flag risks, and surface expansion opportunities without sacrificing personalized service
- Ability to easily demonstrate customer impact and value to both clients and internal leadership; speak to the product or speak to the customer

+ Add need

▶ Tip

## Goals

### Key user goal

- Drive customer retention and expansion through proactive, insight-driven account management
- Build and maintain strong customer relationships that position her as a strategic partner, not just a support agent
- Achieve recognition and tangible results by consistently meeting or exceeding retention, health, and expansion metrics

+ Add goal

▶ Tip

