We help companies drive revenue growth by accelerating the transformation of their Marketing organization.

**Do you have these challenges?**

1. Lack of visibility across projects
2. Too many ‘status update’ meetings
3. Not enough accountability
4. Difficulty justifying new hires
5. Inability to measure productivity
6. Poor cross-functional collaboration
7. Projects often not done on-time
Root Causes

- Multiple systems / spreadsheets
- “Traditional” management style
- No defined processes / workflows
- Poor prioritization & work scoping
- No productivity metrics or process
- Approval processes not defined
- Project / Task templates not built
1. Recognize issues & root causes
2. Assemble your project team
3. Hire an expert coach to help you
4. Assess current operations & methods
5. Refine workflows, processes & SOPs
6. Train managers & staff on “Agile”
7. Migrate to Agile GTM Ops platform
Key Benefits

- Gain full visibility and transparency
- Increase team accountability
- Get projects & tasks done faster
- Effectively prioritize team’s work
- Measure productivity of staff with KPIs
1. ADVISORY

- Review processes, frameworks, systems
- Determine your goals, priorities & challenges
- Define processes, workflows, approvals, metrics & reporting

2. PLATFORM

- Configure software to support your processes
- Build Standard Operating Procedures (SOPs)
- Create project and task templates to standardize how work is performed

3. TRAINING

- Train staff on platform, SOPs and workflows
- Train managers on Agile for prioritizing work
- Provide additional tools and training to staff to help them do their jobs faster & more effectively
1. Advisory

Operational Assessment
- Audit / report on capabilities
- Define action plan for success

Process Optimization
- Weekly workshops with executive sponsor & management team to define processes

Software Configuration
- Set up system to integrate processes, workflows, approvals, & reporting
2. Agile GTM Ops Platform (SaaS)

- Easy-To-Use
- Gives Full Visibility
- Modern Design
- Supports “Agile”
- Customizable
- Pre-Built Projects
- Integrated Resources
3. Training, Playbooks & Toolkits

DM University Training
- 24 online training courses with 750+ integrated playbooks & tool-kits

Agile Operations Bootcamp
- “Crash course” in Agile for staff with deeper training designed for managers

Software Training
- Private instruction to train staff on Standard Operating Procedures (SOPs)
Transform in 60 Days

<table>
<thead>
<tr>
<th>Weeks 1-2</th>
<th>Weeks 3-4</th>
<th>Week 5</th>
<th>Weeks 6-8</th>
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</thead>
<tbody>
<tr>
<td><strong>ASSESS</strong></td>
<td><strong>DESIGN</strong></td>
<td><strong>SETUP</strong></td>
<td><strong>TRAIN</strong></td>
</tr>
<tr>
<td>✓ Review spreadsheets, processes &amp; systems</td>
<td>✓ Define frameworks</td>
<td>✓ Import existing data into platform (CSV)</td>
<td>✓ Agile Bootcamp for staff and managers</td>
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<tr>
<td>✓ Determine priorities, goals &amp; challenges holding you back</td>
<td>✓ Develop playbooks &amp; toolkits to enable staff to execute</td>
<td>✓ Set up system based on framework and strategic plan (OKRs)</td>
<td>✓ Provide access to DM University and assign courses to staff</td>
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<tr>
<td>✓ Develop project plan and engage relevant stakeholders</td>
<td>✓ Create project plan templates to build &quot;standard work&quot;</td>
<td>✓ Define workflows &amp; approval processes</td>
<td>✓ Facilitate 1st sprint planning meeting &amp; retrospective to optimize process</td>
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<tr>
<td>✓ Kick off project</td>
<td>✓ Create SOPs manual to govern platform</td>
<td>✓ Create reports to measure KPIs and staff productivity</td>
<td>✓ Ongoing coaching</td>
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Success & ROI

- Get to market sooner for launches
- 10 to 20% faster project execution
- Improved staff morale & retention for millennials who now expect a modern work environment & tools
- Productivity reporting for remote teams and individuals
- Increased cross-functional team collaboration & effectiveness
1. **Advisory Subscription** - $4,997/month (typically 2-3 months)
   - Weekly 90 min. Zoom workshop + unlimited calls / emails with your expert coach
   - Month-to-Month Term

2. **Platform Subscription** - $3,000/year (1-10 users) or $10,000/year (11-25 users)
   - Agile GTM Ops Software (unlimited projects, tasks, integrations, support)
   - DM University (24 online training courses + 750 playbooks, tools, templates & guides)

3. **Training Workshop** - $500 per person
   - Agile Marketing Bootcamp (Zoom workshops (2), half-day each)
**Proof of Concept**

1. Execute NDA
2. Free Discovery Workshop
3. Send Spreadsheets & Access
4. Build POC on our platform
5. Demo with your team
6. Send proposal / contract
7. Make go / no go decision
About Us

“We are a strategic partner, not just another vendor.”

- Founded in 2006
- HQ: London, Canada
- 200,000+ members globally
- 7,500 all-time customers
- Strategic partnerships: AMA, AIPMM, ANA
A FEW OF OUR 7,500+
ALL-TIME CUSTOMERS