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

Do you have these challenges?

1. Not producing enough qualified leads with Covid-19 cancelling trade shows & events
2. Inability to show Marketing ROI
3. Campaigns & events stressing you out
4. Trying to figure out how to do ABM
5. Difficulty justifying new hires
6. Can’t measure team productivity
Root Causes

- Not tracking leads through to revenue
- Multiple systems / spreadsheets
- Lacking Demand Gen / ABM knowledge
- No defined processes / workflows
- Poor prioritization & work scoping
- No productivity metrics or process
- Project / Task templates not built
7 Steps To Success

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**

- Keep your sales pipeline full of leads
- Measure ROI for campaigns
- Get projects & tasks done faster
- Effectively prioritize team’s work
- Measure productivity of staff with KPIs
How It Works

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 Training 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

**ASSESS**
- Review spreadsheets, processes & systems
- Determine priorities, goals & challenges holding you back
- Develop project plan and engage relevant stakeholders
- Kick off project

**DESIGN**
- Define frameworks
- Develop playbooks & tool-kits to enable staff to execute
- Create project plan templates to build “standard work”
- Create SOPs manual to govern platform

**SETUP**
- Import existing data into platform (CSV)
- Set up system based on framework and strategic plan (OKRs)
- Define workflows & approval processes
- Create reports to measure KPIs and staff productivity

**TRAIN**
- Agile Bootcamp for staff and managers
- Provide access to DM University and assign courses to staff
- Facilitate 1st sprint planning meeting & retrospective to optimize process
- Ongoing coaching
Success & ROI

- Build a marketing ROI dashboard
- Define your marketing / sales funnel
- Increase adoption of systems & tools
- Create a lead qualification process
- Hit sales forecasts consistently
- Improve relationship between Sales and Marketing department
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 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
“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

Accenture
PNC
Corning
Aon
Quanex
Pfizer
Dow
Covidien
Ca Technologies
3M
Schneider Electric
Pall
Beckman Coulter
McAfee
Iron Mountain
Abbott
McAfee
Honeywell
Emerson
Marriott
Caterpillar
Apple
Microsoft
McAfee
Hershey's
Honeywell
BASF
AMD
Marsh
First American
Ciba
Siemens
Ciber
Pitney Bowes
American Standard
OLYMPUS
Palo Alto Networks
USDA
ThyssenKrupp
Fluor
Parker