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

Do you have these challenges?

1. Low visibility into strategic plan execution
2. Strategic plan sitting on a shelf and not well understood by managers & staff
3. Team not working on tasks that align with your strategic objectives and initiatives
4. Difficult to report on work done to achieve strategic objectives each quarter
Root Causes

- Multiple systems / spreadsheets
- Unclear roles & responsibilities
- Outdated processes / workflows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
- Establish full team accountability
- Get new products to market faster
- Increase incremental revenues
- Minimize risk of product launch failure
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

- 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

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 with 24 online training courses
   - 750 Playbooks, Tools & Templates & How-To 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
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