

# CULTURE DRIVEN SALES & GO-TO-MARKET STRATEGY

COURSEBOOK



KELLY BRESLIN WRIGHT

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# Culture Driven Sales & Go-To-Market Strategy

## Course Curriculum

5 Week Course, 2 Credits

**Dates and Time:** 5 Evening Seminar Classes; 6:00pm – 9:30pm PDT

**Name:** Culture Driven Sales & Go-To-Market Strategy

**Instructor:** [Kelly Breslin Wright](#)

**Location:** University of Washington Foster School of Business

**Student Programs:** Full-time MBA; Evening MBA

**Contact Information:** Kelly Breslin Wright

### Course Description

The focus of this class is on the key elements required in building a best-in-class go-to-market strategy and sales organization. We will review the steps needed for a company to build an effective sales strategy that ties to the overall corporate strategy and deploy a high-performing sales organization. This course will review best practices to tie the corporate mission, vision, and core values to the go-to-market approach. Content will incorporate how company and sales culture are tightly tied to an effective and successful go-to-market and sales strategy. Although the course will cover sales strategy and essential elements of running an effective sales organization, there will be limited emphasis on sales technique and the actual selling process (i.e. students should not view this course as a class on how to sell.) The course will focus on best-in-class go-to-market strategies for companies with a direct sales organization.

In this course, we will address:

- Company Vision/Mission
- Core Values
- Culture
- Company Story
- Differentiated Value Propositions
- Ideal Customer Profile
- Sales Motions
- Ideal Seller Profile
- Sales Operations Functions: Sales Organizational Structure, Sales Planning & Compensation, Sales Processes & Tools, Sales Metrics, and Sales Enablement
- Integrated Go-To-Market Strategy

## **Why Is This Course Important to My Career and to the World?**

Business school curriculums provide strategy, finance, marketing, and operations courses to provide a general framework for setting up and running a business. This course builds upon basic business foundations by taking a deeper dive into the development and execution of a successful go-to-market and sales strategy. A go-to-market strategy is the overarching plan and approach to take a product or service to market in a way that best conveys the company's differentiated value and addressing the needs of customers.

Each person in a company, whether a Founder, CEO, or in Product, Engineering, Sales, Marketing, Finance, Operations, or General Administration, should have a comprehensive understanding of the go-to-market and sales strategy, as successful deployment of the strategy requires alignment from all departments and individuals. Companies need a cohesive, integrated strategy that helps drive this cross-departmental alignment. The corporate strategy is tightly coupled with the go-to-market and sales strategy.

The go-to-market approach must engage and motivate all constituents, including customers, partners, employees, investors, analysts, and the communities in which the company serves. The best sales and go-to-market teams sell and market in a manner that communicates the company's purpose, mission, and values. Top go-to-market professionals often crave an inspiring message and story to share with prospects and customers. Customers also care about mission and purpose, as well as how a company conducts itself, as they have increasingly high expectations, demanding exceptional service and thought leadership to drive top-notch customer success. The highest performing go-to-market organizations have cultures that integrate the company's purpose, mission, vision, and core values, enabling cohesive interactions and communications with employees, customers, partners, investors, and communities in which the company operates.

An effective go-to-market strategy requires an organization to first solidify its mission, core values, differentiated value proposition, ideal customer profile, relevant sales motions, and ideal seller profile. This strategy will arm the company with a competitive advantage impacting how the team reaches and interacts with prospects and customers. The course will also cover additional foundational elements required to effectively build and deploy a professional sales organization.

## **What Will I Get from This Course?**

In this Culture Driven Sales & Go-To-Market Strategy course, you will be introduced to the fundamentals needed to develop a go-to-market strategy, sales strategy, and to set up the sales organization. The course will be taught in a practical and applied way.

By the end of this course, you will be able to:

- Articulate what a Go-To-Market Strategy is and why it matters
- Evaluate vision and/or mission statements and assess their alignment with a company's product/service and focus
- Understand the importance of a company's core values and culture and how they impact how go-to-market teams operate and behave
- Assess a company's story and whether it clearly articulates the company's "why"

- Understand how to create differentiated value propositions that tie back to and promote the mission and company story
- Know the components of and how to generate an Ideal Customer Profile
- Comprehend the various sales motions and learn how to match the ideal sales motion(s) to target, reach, and engage the Ideal Customer Profile
- Design an Ideal Seller Profile
- Define the elements and importance of the key Sales Operations Functions
- Provide a comprehensive Go-To-Market and Sales Audit of a company that includes assessment and alignment of Vision/Mission, Core Values, Company Story, Ideal Customer Profile, Differentiated Value Propositions, Ideal Seller Profile, Sales Motion(s), and overall Go-To-Market and Sales Strategy

### **Who Should Take This Course?**

This is a general business course. Future entrepreneurs, founders, and general managers should take this course, as the Go-To-Market strategy must be effectively communicated to raise funding, recruit employees, and sell your product or service. Anyone interested in a career in Go-To-Market, including Sales, Customer Success, and Marketing must be intimately familiar with all these concepts. Product and Engineering leaders need to fully understand how the go-to-market strategy aligns with all elements of the product. Other functions including Finance, Operations, Human Relations, and General Administration will also benefit. This course will provide practical applications and knowledge surrounding go-to-market and sales strategies relevant for companies of any size or vertical.

### **Who Is the Instructor?**

Kelly Breslin Wright has over 30 years of experience in leadership, sales, operations, and strategy roles. She has deep go-to-market experience and has helped teams navigate multiple stages of company growth, through IPO, global expansion, leadership transitions, business model changes, and the demands of being a private and public company. Kelly spent 12 years from 2005 – 2016 at [Tableau Software](#) as Executive Vice President, Sales. She joined Tableau as the company's tenth employee and first salesperson in 2005 one month before the launch of version 1, and she helped grow Tableau into a multi-billion-dollar public company as a key member of the executive team. She grew Tableau's worldwide sales and field operations from zero to \$850m in revenue and managed over half of Tableau's global team as the company grew to 3,400 employees. Kelly was responsible for all revenue and worldwide sales and field operations, including Direct Sales, Channel Sales, Services, Training, Technical Support, Customer Success, Sales Operations, and Sales Readiness. (Tableau was acquired by Salesforce in 2019 for \$15.7B.)

After Tableau, Kelly was President and Chief Operating Officer at [Gong](#) from 2021-2023. Gong is an Artificial Intelligence company that provides an AI Revenue Intelligence Platform that helps companies better engage customers, forecast accurately, improve team productivity, and increase revenues.

Kelly has also served on many corporate boards as a director and advisor. Her board service has included both public and private company boards, including: [Fastly](#) (NYSE:FSLY), [Plum Acquisition Corp I](#) (NASDAQ:PLMI), [Lucid](#), [Gong](#), [Even](#), and [Amperity](#). She was a Board Advisor at [Dropbox](#), [Asana](#), [data.world](#), [Hyperproof](#), and [Cien](#). She has

served on multiple non-profit boards, including the Stanford LEAD Council, Stanford Seattle Advisors, [The Jack and Ann Rhodes Professional Sales Program at UW Foster School of Business](#), and many women on board organizations.

Kelly is Founder and CEO of [Culture Driven Sales](#), her own thought leadership platform that she created to help companies create exceptional cultures that drive sales. She is an active speaker, writer, and podcaster on Culture Driven Sales, as well as other topics including Sales, Go-To-Market, Scaling, Culture, High Performing Teams, Operational Excellence, Diversity, and Women in Leadership.

Kelly created this Culture Driven Sales & Go-To-Market Strategy course and the content covered to fill a void in curriculum essential to business leaders that was noticeably missing at the top business schools. The content she has created for her company and the expertise that she brings to her board roles are central to the curriculum covered in the class.

### **How Will I Learn in This Course? What Is the Format?**

This course will be interactive, demanding active participation from the students. The format will be varied, including readings, discussions, group activities, guest speakers, case work, individual work, and team projects. Readings will help you prepare for each session. You will have individual homework reflections to apply your learnings. The culmination of the course will be a final team project which incorporates a written component and a final class presentation.

### **What Are Required in Assignments?**

Each student is expected to submit assignments throughout the course. For three of the five sessions, you will write and submit an individual reflection assignment. Assignments require the student to synthesize learnings from the readings and class sessions. The requirements for each assignment are to address the requirements outlined in the grading rubric.

### **What Is the Final Project?**

All students must complete a final project, which includes both a written report and a group oral presentation. The final project will consist of a "Sales Audit" for a company that has a professional sales organization and meets the minimum criteria. The project will involve selecting a company, doing research and investigation on the company's go-to-market and sales strategies and practices, interviewing people currently or formerly part of the organization to best understand the company's approach, and compiling a final written project report.

The instructor will approve teams' proposed companies on a first come, first served basis. Any final project company must meet these following requirements:

- Have a published vision and/or mission statement
- Have published core values
- Have at least one product or service currently sold in the market
- Have a sales organization with a direct sales force
- Have a B2B sales motion (B2B rather than B2C companies are strongly preferred)

The company (which can be public or private) cannot be one of the companies covered in the Session 1 class mission/vision exercise. Nobody on the project team can have ever worked at, advised, or consulted for the company. The rubric requires interviews with current or prior company employees, so keep this in mind when selecting the company to help make the research component more accessible.

The audit should address all the dimensions covered in the class, which include (but are not limited to) the following:

- Company Vision and/or Mission
- Company Core Values
- Company Story
- Differentiated Value Proposition
- Ideal Customer Profile
- Sales Motion(s)
- Ideal Seller Profile
- Sales Operations Functions: Sales Organizational Structure, Sales Planning & Compensation, Sales Processes & Tools, Sales Metrics, and Sales Enablement
- Integrated Go-To-Market Strategy

Include references used at the end of the written report. Each team must have at least 5 sources. Sources may include your own research on the company's website, filings, books, articles, or interviews with current or former company staff.

## **How Does Grading Work?**

### *Class Participation Grading:*

Class Participation is 20% of your grade. You are expected to actively participate in classroom activities, discussions, class breakouts, surveys, and in class and team projects.

Students have different preferences with regards to participation. Some students will feel more comfortable speaking up in the full class sessions, while others prefer participating more actively in breakouts. Participation points can be earned by contacting the instructor outside of class time, scheduling time in office hours, posting in canvas discussions, or presenting homework to the class.

Class participation makes classroom discussions and activities interesting, insightful, and fun. Students are expected to know the material, to have done the required classwork preparation, and to participate in a way that positively contributes to the classroom discussion and learnings. Participation which detracts from the learning environment will negatively impact the participation grade.

Participation will include the instructor calling on both individuals with hands raised and random calling. Participation is encouraged, but there is no need to contribute to every discussion and activity.

Surveys will be given to provide feedback to help improve the course content and format. Participation in these surveys will contribute to your class participation.

Self and peer evaluations assessing class participation are factored into the class participation grade.

Some of the best contributors are those who participate in a subset of sessions, discussions, and activities, but whose comments and contributions are insightful and compelling. Quality is just as, if not more, important than quantity.

Given that class participation is a large portion of the total grade, missing multiple class sessions may negatively impact the participation grade.

The Class Participation grade will be calibrated according to the Class Participation Rubric listed under the Class Participation Grade for Course Assignment.

#### *Homework Grading:*

Your three homework assignments contribute to 30% of your overall class grade. There are three individual homework assignments, due at the beginning of the second, third, and fourth sessions. Each assignment represents 10% of your overall grade. The assignments will be graded according to the rubrics listed under each assignment in the class schedule.

#### *Final Team Project Grading:*

The final team project represents 50% of your overall grade. The final project will have a team grade assessing team performance according to the rubric outlined in the class schedule.

### **What Are the Readings?**

You will need to purchase the book *The Challenger Sale: Taking Control of the Customer Conversation* by Matthew Dixon and Brent Adamson at a bookstore or online. ISBN 9781591844358. The book is 240 pages. The book can be purchased online for approximately \$10.

You also must purchase the Harvard Business Publishing Coursepack, which includes one reading by Harvard Business Publishing entitled "Sales Force Design and Management" by Doug Chung and Das Narayandas (32 pages). The coursepack costs \$8.75 and should be purchased at [MKTG 579: Culture Driven Sales and Go-To-Market Strategy Coursepack Spring 2024](#).

The rest of the readings will be Articles and online resources. Readings and articles are accessible through online web links:

- [Why Vision and Mission Really Do Matter](#)
- [HBR Article: The Difference Between Purpose and Mission](#)
- [Difference Between Vision and Mission Statements: 25 Examples](#)
- [Create a Winning Company Culture By Perfecting These 2 Elements](#)
- [The 3 Stories Every Company Should Know And Share Often](#)
- [Sales Operations Demystified: What It Is, Why It Matters, and How To Do It Right](#)

### **Course Workload:**

During this five-week course, there is approximately 30-90 minutes of reading per week.



There are three individual homework assignments, due in sessions 2, 3, and 4. These assignments are short 1-page reflections that should take no more than 60 minutes to complete.

The final team project is worth 50% of your grade and is the largest time commitment for your work outside of class. Although time committed in this project varies widely by team, you should be able to complete the team project with an individual investment of 5-10 hours outside of class time.

Total time commitment outside of class (including readings, homework assignments, and team project) is approximately 15-25 hours over the five weeks, or 3-5 hours per week.

## Outline of Sessions and Assignments

### **Session 1: Go-To-Market Mission and Core Values**

Readings:

- [Why Vision and Mission Really Do Matter](#)
- [HBR: The Difference Between Purpose and Mission](#)
- [Difference Between Vision and Mission Statements: 25 Examples](#)
- [Create a Winning Company Culture By Perfecting These 2 Elements](#)

Course Content:

6:00pm – 7:00pm

- Introduction of Culture Driven Sales & Go-To-Market Strategy and course & grading expectations (20 minutes)
- Introduction to Final Team Project Assignment (10 minutes)
- Review definitions of vision/mission, why they are important, and class discussion (20 minutes)
- Group Activity on Company Mission Statements (20 minutes)

7:00pm – 7:10pm – Break

7:10pm – 8:10pm

- Group Presentations on Mission activity (20 minutes)
- Watch Simon Sinek Video: How Great Leaders Inspire Action – TED Talk (18 Minutes)
- Class Discussion on Simon Sinek Video (20 minutes)

8:10pm – 8:20pm - Break

8:20pm – 9:30pm

- Guest speaker on Mission, Values, and Company Story (40 minutes for fireside and live Q&A)
- Class Reflections (20 minutes)
- Discuss Readings and Homework due Session 2 (5 minutes)
- Class Participation Self-Assessment (5 minutes)

Discussion Questions:

1. What is a Go-To-Market Strategy?
2. What is the difference between vision and mission?
3. Why should a company have a stated mission?
4. Why is the “why” important?
5. Why should company culture be a priority? Why do core values matter?
6. How do mission and culture influence Go-To-Market Strategy?

Learning Objectives. By the end of this class, you will be able to:

1. Evaluate vision and/or mission statements and assess their alignment with a company's product, core values, and focus
2. Ability to articulate what a Go-To-Market Strategy is and why it matters

*Homework Due Session 2:*

- Homework #1: Vision, Mission, and Core Values Reflection

Pick a company with a public vision and/or mission statement and core values. Company should be different from companies reviewed in class during Session 1. Using principles reviewed in Session 1, write an assessment of the effectiveness and alignment of the mission/vision and core values with the company's business. Company must have a published vision and/or mission statement and core values stated on their official website. Reflection should take 30-60 minutes to complete and should be 1.5 pages or less.

Criteria	Points (10 Total)			
Identify company, vision and/or mission, and core values	<p>Excellent (4 points)</p> <p>Identifies company, along with published vision and/or mission. Lists all core values. Includes reference(s) links on company website where these were identified and/or found.</p>	<p>Good (3 points)</p> <p>Identifies company, along with published vision and/or mission, and lists core values. Missing references.</p>	<p>Satisfactory (1-2 points)</p> <p>Lists company but has only vision/mission or core values. Missing having both and missing references.</p>	<p>Needs Improvement (0 points)</p> <p>Missing both vision/mission statement or core values. Missing references.</p>
Describe if and how vision and/or mission impact company and drive company strategy	<p>Excellent (3 points)</p> <p>Detailed description of effectiveness and alignment of company vision and/or mission statement to company purpose and company strategy.</p>	<p>Good (2 points)</p> <p>Partial description of effectiveness and alignment of company vision and/or mission statement to company purpose and company strategy.</p>	<p>Satisfactory (1 point)</p> <p>Description of effectiveness of</p>	<p>Needs Improvement (0 points)</p> <p>Lacks explanation of how vision and/or mission statement ties to company purpose or company strategy.</p>
Describe if and how core values affect employee behavior and	<p>Excellent (3 points)</p> <p>Effectively ties core values to company</p>	<p>Good (2 points)</p> <p>Ties core values to company purpose,</p>	<p>Satisfactory (1 point)</p> <p>Highlights core values but limited</p>	<p>Needs Improvement (0 points)</p>

impact company	purpose and company culture. Draws correlation between core values and company strategy.	but lacks clear correlation between values and company culture.	connection between those values and company culture and employee behavior.	Lacks explanation of how core values impact employee behavior, company culture, or company strategy.
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- Proposal for Sales Audit Final Team Project, including company name and team members, due before start of Session 2.

Project teams should have 4-5 students, with no more than 5 students per team. No team member can have worked or advised for the proposed company. Final project teams will have in-class team activities and breakout time to help prepare for the final project.

## **Session 2: Differentiated Value Proposition, & Ideal Customer Profile**

### Readings:

- *The Challenger Sale: Taking Control of the Customer Conversation* by Matthew Dixon and Brent Adamson, Chapters 1 – 4, pages 1 – 64 (ISBN 9781591844358)
- [The 3 Stories Every Company Should Know And Share Often](#)

### Course Content:

6:00pm – 7:00pm

- Agenda and Learning Objectives for Session 2 (5 minutes)
- Challenger Sale Lesson (20 minutes)
- Guest Speaker (30 minutes)

7:00pm – 7:10pm – Break

7:10pm – 8:10pm

- The Challenger Sale Discussion (10 minutes)
- Discuss Vision, Mission, Core Values Homework – few examples (15 minutes)
- Core Values Discussion (15 minutes)
- Storytelling Lesson (5 minutes)
- Differentiated Value Propositions Lesson (15 minutes)

8:10pm – 8:20pm – Break

8:20pm – 9:30pm

- Differentiated Value Proposition Team Breakout (15 minutes)
- Differentiated Value Proposition Class Discussion (10 minutes)
- Introduction of Ideal Customer Profile (20 minutes)
- Ideal Customer Profile Homework Assignment and Questions about Final Sales Audit (5 minutes)
- Class Takeaways from Session 2 (10 minutes)
- Class Participation Self-Assessment (5 minutes)

### Class Discussion Questions:

- How does the Challenger Sale approach help craft a company's positioning and messaging?
- How can a company leverage the mission, values, and company story into a differentiated value proposition?
- What are key factors in determining the Ideal Customer Profile?

Learning Objectives. By the end of this class, you will be able to:

1. Articulate characteristics of the Challenger Sale approach
2. Assess if a company's story is compelling and ties into the differentiated value proposition

### 3. Generate a defensible Ideal Customer Profile

#### Homework Due Session 3: Ideal Customer Profile

- *Ideal Customer Profile*: Assess your company's Ideal Customer Profile. For homework, use Ideal Customer Profile template provided on canvas. This homework should take you approximately 30 minutes. (This is an individual assignment.)

Criteria	Points (10 Total)			
Write the Ideal Customer Profile	<p>Excellent (5 points)</p> <p>Ideal Customer Profile is comprehensive list of ideal characteristics, including ideal company attributes, ideal use case(s), target company demographics, and other requirements.</p>	<p>Good (3-4 points)</p> <p>Ideal Customer Profile contains list of ideal characteristics, including ideal company attributes, ideal use case(s), target company demographics, and other requirements, but not entirely comprehensive.</p>	<p>Satisfactory (2 point)</p> <p>Ideal Customer Profile is missing key characteristics which should be included.</p>	<p>Needs Improvement (0-1 point)</p> <p>Ideal Customer Profile is incomplete.</p>
Write list of questions to flush out and assess Ideal Customer Profile	<p>Excellent (5 points)</p> <p>Detailed list of questions to be asked to validate all attributes listed in Ideal Customer Profile.</p>	<p>Good (3-4 points)</p> <p>Good list of questions to be asked to validate all attributes listed in Ideal Customer Profile.</p>	<p>Satisfactory (2 point)</p> <p>Incomplete list of questions, covering only a few target areas of the Ideal Customer Profile.</p>	<p>Needs Improvement (0-1 point)</p> <p>Questions are missing or very incomplete.</p>

Reading:

- n/a

Course Content:

6:00pm – 7:05pm

- Agenda and Learning Objectives for Session 3 (5 minutes)
- Discuss Ideal Customer Profile Homework (15 minutes)
- Team Breakout. Discuss your company's ICP (15 minutes)
- Sales Motions Lesson (30 minutes)

7:05 – 7:15pm – Break

7:15 – 8:10pm

- Team Breakout. Discuss your company's Sales Motions (15 minutes)
- Class Discussion on Sales Motions (15 minutes)
- Ideal Seller Profile (20 minutes)
- Ideal Seller Profile Homework (5 minutes)

8:10 – 8:20pm – Break

8:20pm – 9:30pm

- Final Sales Audit – List of Resources and Brainstorm Questions (30 Minutes)
- Learnings and Takeaways from Today's Session (15 minutes)
- Ideal Seller Profile Homework and Questions about Final Sales Audit (10 minutes)
- Class Participation Self-Assessment (5 minutes)

Class Discussion Questions:

1. How is the optimal sales motion related to the company's mission? Go-To-Market strategy?
2. What are the different sales motions?
3. What are the key attributes of an Ideal Seller Profile?

Learning Objectives. By the end of this class, you will be able to:

1. Identify the best sales motion(s) to engage with your company's target Ideal Customer Profile
2. Design an Ideal Seller Profile based on what you know of your company's Ideal Customer Profile, Differentiated Value Proposition, and target Sales Motion (Use the Ideal Seller Profile worksheet.)

*Homework Due Session 4: Ideal Seller Profile*

Write the Ideal Seller Profile for your company. If your company enlists multiple sales motions, identify which motion is the basis for your ISP. For homework, use provided Ideal Seller Profile template on canvas. This homework should take you approximately 30 minutes. (This is an individual assignment.)

Criteria	Points (10 Total)			
Write the Ideal Seller Profile skills and experience	<p>Excellent (3 points)</p> <p>Ideal Seller Profile includes a summary of ISP profile and comprehensive list of ideal background, skills and experience requirements, and behavioral traits.</p>	<p>Good (2 points)</p> <p>Ideal Seller Profile includes some of ideal background, skills, and experience requirements, but could be more comprehensive.</p>	<p>Satisfactory (1 point)</p> <p>Ideal Seller Profile is incomplete background, skills, and experience requirements.</p>	<p>Incomplete (0 points)</p> <p>Ideal Seller Profile is missing background, skills, and experience section.</p>
Write the Ideal Seller Profile behavioral traits	<p>Excellent (3 points)</p> <p>Ideal Seller Profile includes list of at least 10 relevant behavioral traits.</p>	<p>Good (2 points)</p> <p>Ideal Seller Profile includes at least 7 relevant behavioral traits.</p>	<p>Satisfactory (1 point)</p> <p>Ideal Seller Profile includes less than 7 relevant behavioral traits.</p>	<p>Incomplete (0 points)</p> <p>Ideal Seller Profile is missing behavioral traits section.</p>
Interview questions to be asked of candidate to assess match against Ideal Seller Profile	<p>Excellent (4 points)</p> <p>List of at least 10 questions to assess candidate's fit with Ideal Seller Profile. List to include questions to assess fit for ideal background, skills, and experience and at least 5 questions to assess against ideal behavioral traits.</p>	<p>Good (3 points)</p> <p>List of at least 7 questions to assess candidate's fit with Ideal Seller Profile. List to include questions to assess fit for ideal background, skills, and experience and at least 3 questions to assess against ideal behavioral traits.</p>	<p>Satisfactory (2 point)</p> <p>Incomplete list of questions, covering only a few target interview areas. List is missing questions to assess either background and experience or behavioral attributes.</p>	<p>Needs Improvement (0-1 point)</p> <p>Questions are missing or very incomplete.</p>



## **Session 4**

## **Sales Operations Functions**

### Readings:

- Harvard Business Publishing: “Sales Force Design and Management” by Doug Chung and Das Narayandas (32 pages)
- [Sales Operations Demystified: What It Is, Why It Matters, and How To Do It Right](#)

### Course Content:

6:00pm – 7:00pm

- Agenda and Learning Objectives for Session 3 (5 minutes)
- Sales Operations Functions Guest Speakers (55 Minutes)

7:00pm – 7:10pm - Break

7:10pm – 8:15pm

- Discuss Ideal Seller Profile Homework (15 minutes)
- Tableau Case Study & Discussion (50 minutes)

8:15pm – 8:25pm - Break

8:25pm – 9:30pm

- Final Team Project Review, Expectations, and Questions (10 Minutes)
- Team Breakout. Work on final audit (30 minutes)
- Key Learnings/Takeaways (20 Minutes)
- Class Participation Self-Assessment (5 minutes)

### Class Discussion Questions:

1. What are the key Sales Operations Functions?
2. What are practical examples of Sales Operations you have seen in the workplace?
3. What are learnings and best practices from years in the sales profession?

### Learning Objectives. By the end of this class, you will be able to:

1. Ability to describe the 5 core sales operations functions of Sales Organizational Structure, Sales Planning & Compensation, Sales Processes & Tools, Sales Metrics, and Sales Enablement
2. Explore and discuss open questions and practical applications of Go-To-Market Strategy with key sales leaders with diverse backgrounds

*Final Team Project Due Session 5: Sales Audit (Final Written Paper and Oral Presentation)*

The Final Project will consist of a “Sales Audit” for a company that has a professional sales organization. The team project will involve selecting a company, doing research and investigation on the company’s Go-To-Market & Sales Strategy, sales practices,

and sales structure. Teams will do research leveraging the company's website, marketing materials, publicly available information, and interviews with people associated with the organization to best understand the company's approach. Project teams will be finalized by the start of Session 2. The Sales Audit includes both a written report and an oral team presentation, including a recorded video.

Teams will be comprised of self-organized teams of 7-8 students. Teams will submit a request for the final project company, and companies will be approved and assigned on a first come, first served basis. Each team will be required to select a company that meets these requirements:

- Has a published vision and/or mission statement on corporate website
- Has published core values on corporate website
- Has at least one product or service currently sold in the market
- Has a sales organization with a direct sales force

The audit should address topics covered in the class, which may include (but are not limited to) the following:

- Company Vision and/or Mission
- Company Core Values
- Company Story
- Differentiated Value Proposition
- Ideal Customer Profile
- Sales Motion(s)
- Ideal Seller Profile
- Sales Operations Functions: Sales Organizational Structure, Sales Planning & Compensation, Sales Processes & Tools, Sales Metrics, and Sales Enablement
- Integrated Go-To-Market Strategy Assessment

Your audit will include your team's overall assessment on the effectiveness of your company's go-to-market and sales strategy in relation to the principles taught in this course.

Have fun with this project! The last section, your Integrated Go-To-Market Strategy Assessment, could be a grade, a rating, a list of pros/cons, a review of what was done well and what could be done better, a reflection on what works and what doesn't work, or however else you want to summarize your team's assessment.

Include references used in your written report at the end of the written report. Each team must have at least 5 sources. Sources may include your own research on the company's website, books, articles, and/or interviews with current or former company staff. Refer to List of Resources/Research Ideas for Sales Audit for research ideas.

The final oral presentation will showcase each team's project for the rest of the class, summarizing Mktg 579 course principles into practical, applied learnings and takeaways. The Sales Audit Presentation should provide a summarized Go-To-Market & Sales Strategy Assessment based on the rubric criteria. Thorough assessment and critique should cover the effectiveness of company's Go-To-Market Strategy in relation

to the principles learned in this course, incorporating how the mission/vision/values and at least 4 other Sales Audit rubric criteria factor into the company's overarching Go-To-Market Strategy.

#### Video Requirements:

- 5 Minute Time Limit
- Video format should be Zoom recording downloadable file or YouTube
- Upload Zoom video file or YouTube link to Video Assignment on Canvas by midnight on May 28, 2024
- Each team can decide ideal participation format for this video. Teams can choose to have just one student present, all team members participate, or whatever team prefers.

This video will be graded as one of the categories on the final Sales Audit rubric. These videos will showcase each team's project for the rest of the class to summarize the course principles into practical, applied learnings and takeaways. Video will be cut at 5 minutes, so if video is longer than 5 minutes, only the first 5 minutes will be shown.

Total oral presentation length is 10 minutes maximum: 3-5 minute recorded video and up to 5 minutes for class Q&A. After video is shown to the entire class, the team will lead class Q&A for up to 5 minutes. Teams can choose to have just one student lead class Q&A, have all team members participate, or whatever team prefers. Team members participating in the oral presentation class Q&A portion will come to the front of class for class discussion. Q&A portion will be limited to 5 minutes maximum.

<b>Final Sales Team Audit</b>	<b>Points (100 Total)</b>			
<b>Written Report</b>	<b>Points (90 of 100 total)</b>			
Company Vision and/or Mission (10 points)	<p>Excellent (9-10 points)</p> <p>Description of company with overview of what company does, products and services it provides, and company vision and/or mission with thorough description and explanation of how the vision and/or mission is representative of the company's true north</p>	<p>Good (7-8 points)</p> <p>Description of company with overview of what company does, products and services it provides, and company vision and/or mission with basic description of how the vision and/or mission is representative of the company's true north</p>	<p>Incomplete (4-6 points)</p> <p>Description of company with overview of what company does, products and services it provides, and company vision and/or mission. Incomplete explanation of how the vision and/or mission is representative of the company's true north</p>	<p>Needs Improvement (0-3 points)</p> <p>Missing or incomplete company vision and/or mission and missing description of how the vision and/or mission is representative of the company's true north</p>
Company Values and Culture (10 points)	<p>Excellent (9-10 points)</p> <p>Lists company's core values, a full review of their impact on company culture, and a description of how the core values are integrated into daily employee and team behavior and performance management</p>	<p>Good (7-8 points)</p> <p>Lists company's core values and full review of their impact on the company culture</p>	<p>Incomplete (4-6 points)</p> <p>Lists company's core values and bare definition of impact on company culture</p>	<p>Needs Improvement (0-3 points)</p> <p>Missing or incomplete company core values and culture explanation</p>
Company Story (5 points)	<p>Excellent (5 points)</p> <p>Explanation of the company founding story, incorporating the differentiated value proposition, the "why" this is important, packaged in a way that could be used to provide thought leadership to the</p>	<p>Good (3-4 points)</p> <p>Explanation of the company founding story, incorporating the differentiated value proposition and the "why" this is important</p>	<p>Incomplete (1-2 points)</p> <p>Incomplete explanation of the company founding story or rough outline without full company story</p>	<p>Missing (0 points)</p> <p>Company story missing</p>

	space, prospects, and customers			
Differentiated Value Proposition (10 points)	Excellent (9-10 points) Thorough explanation of the differentiated value proposition highlighting not only the differentiators but also why this matters to the prospect/customer and how they provide unique and differentiated competitive advantages over other competitive options	Good (7-8 points) Detailed explanation of the differentiated value proposition and why this matters to the prospect/customer	Satisfactory (4-6 points) General overview of differentiated value proposition	Needs Improvement (0-3 points) Lacking clear differentiated value proposition
Ideal Customer Profile Use provided Ideal Customer Profile Template (10 points)	Excellent (9-10 points) Comprehensive list of Ideal Customer Profile attributes including many factors in target company Demographics and Needs along with a list of at least 10 open-ended discovery questions to ask prospects to help qualify customer attributes and measure the prospect's fit with ICP propensity to buy	Good (7-8 points) Thorough list of Ideal Customer Profile attributes including many factors in Customer Demographics and Needs	Satisfactory (4-6 points) Basic of Ideal Customer Profile attributes	Needs Improvement (0-3 points) Lacking Ideal Customer Profile
Sales Motion(s) (10 points)	Excellent (9-10 points) Comprehensive explanation of sales motion(s), including why the motions are used, and an assessment as to whether the motions are the best way to address the Ideal Customer Profile and align with the	Good (7-8 points) Thorough explanation of sales motion(s) used, including why the company leverages such motions	Incomplete (4-6 points) Basic explanation of sales motion(s) used	Needs Improvement (0-3 points) Lacking sufficient definition or explanation of sales motion(s)

	company's go-to-market strategy			
Ideal Seller Profile  Use provided Ideal Seller Profile Template  (10 points)	Excellent (9-10 points)  Comprehensive list of Ideal Seller Profile attributes including explanation as to why Seller Profile aligns with the company's Go-To-Market strategy and list of interview questions to qualify prospective sales candidates	Good (7-8 points)  Thorough list of Ideal Seller Profile attributes including explanation as to why Seller Profile aligns with the company's Go-To-Market strategy with limited questions	Incomplete (4-6 points)  Basic explanation of Ideal Seller Profile with minimal questions	Needs Improvement (0-3 points)  Lacking Ideal Seller Profile with no questions
Sales Operations Overview  (10 points)	Excellent (9-10 points)  Coverage of all five Sales Operations Functions, including Sales Organizational Structure, elements of and/or factors considered in Sales Planning & Compensation, description of at least one key Sales Process and/or Tool, explanation of at least one Sales Metrics for tracking or measuring performance, and explanation of approach or at least one program within Sales Enablement	Good (7-8 points)  Coverage of four Sales Operations Functions, including Sales Organizational Structure, elements of and/or factors considered in Sales Planning & Compensation, description of at least one key Sales Process and/or Tool, explanation of at least one Sales Metrics for tracking or measuring performance, and explanation of approach or at least one program within Sales Enablement	Incomplete (4-6 points)  Coverage of three Sales Operations Functions, including Sales Organizational Structure, elements of and/or factors considered in Sales Planning & Compensation, description of at least one key Sales Process and/or Tool, explanation of at least one Sales Metrics for tracking or measuring performance, and explanation of approach or at least one program within Sales Enablement	Needs Improvement (0-3 points)  Coverage of two or less Sales Operations Functions, including Sales Organizational Structure, elements of and/or factors considered in Sales Planning & Compensation, description of at least one key Sales Process and/or Tool, explanation of at least one Sales Metrics for tracking or measuring performance, and explanation of approach or at least one program within Sales Enablement
Audit Assessment of Go-To-Market Strategy  (10 points)  (Assessment of company's overarching	Excellent (9-10 points)  Thorough assessment and critique of the effectiveness of company's Go-To-Market Strategy in relation to the principles learned in this course,	Good (7-8 points)  Good assessment and critique of the effectiveness of company's Go-To-Market Strategy in relation to the principles learned in this course,	Incomplete (4-6 points)  Basic assessment of the effectiveness of company's Go-To-Market Strategy in relation to the principles learned in this course, incorporating how the	Needs Improvement (0-3 points)  Incomplete assessment of the effectiveness of company's Go-To-Market Strategy in relation to the principles learned in this course. Poor tie-

go-to-market strategy encompassing all the elements of the course.)	incorporating how the mission/vision/values and at least 4 other Sales Audit rubric criteria factor into the company's overarching Go-To-Market Strategy.	incorporating how the mission/vision/values and at least 2-3 other Sales Audit rubric criteria factor into the company's overarching Go-To-Market Strategy.	mission/vision/values but missing tie-ins with adequate examples of how the other Sales Audit rubric criteria factor into the company's overarching Go-To-Market Strategy.	ins back to mission/vision/values or additional elements of the Sales Audit criteria incorporated into assessment.
References (5 points)	Excellent (5 points)  At least 5 references from various sources, including but not limited to the company's website and marketing materials, books, articles, or interviews with current or prior company staff. Excellent rating requires at least 2 interviews with current or prior company staff	Good (3-4 points)  At least 3-4 references from various sources, including but not limited to the company's website and marketing materials, books, articles, or interviews with current or prior company staff or including 5 required references, but not from a variety of sources. Good rating requires at least one interview with current or prior company staff	Incomplete (1-2 points)  1-2 references listed	Missing (0 points)  No references listed
<b>Oral Presentation</b>	<b>Points (10 of 100 total)</b>			
Final Team Sales Audit Video and Oral Presentation  Total oral presentation length is 10 minutes maximum:  3-5 minutes recorded video and up to 5 minutes of class Q&A  Team can decide number of	Excellent (9-10 points)  Excellent, organized, and engaging oral presentation within time limit that summarizes team's assessment of the company's overarching go-to-market and sales strategy, including all of the following:  <ul style="list-style-type: none"> <li>- Company Vision/Mission</li> <li>- Core Values/Culture</li> <li>- Company Story</li> </ul>	Good (7-8 points)  Good oral presentation that summarizes team's assessment of the company's overarching go-to-market and sales strategy, including most of following:  <ul style="list-style-type: none"> <li>- Company Vision/Mission</li> <li>- Core Values/Culture</li> <li>- Company Story</li> <li>- Differentiated Value Propositions</li> </ul>	Satisfactory (4-6 points)  Satisfactory oral presentation that summarizes team assessment of the company's overarching go-to-market and sales strategy and includes at least 3 of the following:  <ul style="list-style-type: none"> <li>- Company Vision/Mission</li> <li>- Core Values/Culture</li> <li>- Company Story</li> </ul>	Needs Improvement (0-3 points)  Oral presentation missed key elements of summarizing team's assessment of the company's overarching go-to-market and sales strategy. Presentation could have been better structured and organized.

<p>presenters – can be as few as one or multiple (10 points)</p>	<ul style="list-style-type: none"> <li>- Differentiated Value Propositions</li> <li>- Ideal Customer Profile</li> <li>- Ideal Seller Profile</li> </ul> <p>You may include other elements covered in the final written audit, but these above must be covered in the video presentation for full credit. Points will be deducted if video is longer than 5 minutes or if total presentation runs over 10 minutes.</p>	<ul style="list-style-type: none"> <li>- Ideal Customer Profile</li> <li>- Ideal Seller Profile</li> </ul>	<ul style="list-style-type: none"> <li>- Differentiated Value Propositions</li> <li>- Ideal Customer Profile</li> <li>- Ideal Seller Profile</li> </ul>	
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## Final Team Sales Audit Project

### Recorded Video Presentation and Project Team Discussion

The final oral presentation will showcase each team's project for the rest of the class, summarizing Mktg 579 course principles into practical, applied learnings and takeaways. The Sales Audit Recorded Video should provide a summarized assessment and critique of the effectiveness of the company's go-to-market & sales strategy in relation to core principles taught in the course. Video may provide an assessment of as many course principles as you'd like in the allotted time, so long as they cover these key principles:

- Company Vision/Mission
- Company Core Values/Culture
- Company Story
- Differentiated Value Propositions
- Ideal Customer Profile
- Ideal Seller Profile

Video Requirements:

- 5 Minute Time Limit
- Video format should be Zoom recording downloadable file or YouTube
- Upload Zoom video file or YouTube link to Video Assignment on Canvas by midnight on May 28, 2024
- Each team can decide ideal participation format for this video. Teams can choose to have just one student present, all team members participate, or whatever team prefers

Total oral presentation length is 10 minutes maximum: 3-5 minutes recorded video and up to 5 minutes of class Q&A. After video is shown to class, the project team will lead class Q&A for up to 5 minutes. Teams can choose to have just one student lead class Q&A, have all team members participate, or whatever team prefers. Team members participating in the oral presentation class Q&A portion will come to the front of class for class discussion. Q&A portion will be limited to 5 minutes maximum.

Have fun with this project! Your assessment could be a grade, a rating, a list of pros/cons, a review of what was done well and what could be done better, a reflection on what works and what doesn't work, or however else you want to summarize your team's assessment. Before getting to the assessment portion of your video, your team will need to provide some basics and the overall context, covering mission/vision, core values, company story, differentiated values propositions, Ideal Customer Profile, Ideal Seller Profile, and whatever other points about Sales Motions, Sales Operations, or other principles covered in the course you'd like to cover. The context overview should be 3 minutes or less, leaving the remaining time to review your team's assessment.

For the open Q&A portion of each presentation, each project team will facilitate its own discussion, fielding questions from the class or asking prompts to facilitate discussion. Each team may want to assign a point person to manage the classroom discussion.

Instructor will be time-keeper, as each team will have a max of 10 minutes. If discussion ends earlier, we will move onto the next team.

The recorded video will be the main component of your team's Oral Presentation points on the Sales Audit rubric. Each member of the project team will receive the same grade for the video.

## **Session 5**

## **Final Project Presentations and Reflections**

### Readings:

- None – all efforts on final project

### Content to Watch Before Class:

- Optional to watch recorded Sales Executive Panel Video

### Final Project: Company Audit

- Final Team Sales Audit Written Report must both be submitted on canvas by the beginning of class.
- Each team will present a final oral presentation. After maximum 5-minute team presentation, each team will have up to 5 minutes to lead a discussion and answer general Q&A from the class.

### Course Content:

#### 6:00pm – 7:10pm

- Introduction of Session (5 minutes)
- Final Sales Audit Project Discussion (10 minutes)
- Final Sales Audit Project Presentations – 5 Teams (55 minutes)

#### 7:10pm – 7:25pm - Break

#### 7:25pm – 9:00pm

- Final Sales Audit Project Presentations – 4 Teams (45 minutes)
- Final Sales Audit Project Votes and Discussion (15 minutes)
- Class Reflections (20 minutes)
- Course Evaluation (15 minutes)

### Learning Objectives. By the end of this class, you will be able to:

1. Provide a comprehensive Sales Audit for a company, including assessment of Mission, Core Values, Company Story, Differentiated Value Propositions, Ideal Customer Profile, Sales Motion(s), Ideal Seller Profile, Sales Operations Functions, and overall Go-To-Market Strategy
2. Evaluate whether a company's go-to-market strategy adequately aligns with the mission, core values, and company story
3. Synthesize and communicate your findings in an effective written and oral presentation

### *Class Participation Grade for Course*

Class Preparation and Participation (20% of course grade) is evaluated on a 20-point scale. Classroom learning, especially in an online environment, benefits from an

interactive environment with active participation, lively discussions, and experience sharing. Diversity of thought and multiple perspectives lead to improved learning. This course involves classroom activities, exercises, case discussions, and peer feedback which all directly impact the learning environment of the class. The class participation grade incorporates the student's individual constructive oral contributions and contributions to creating a positive, respectful classroom learning environment. Participation also includes following the guidelines for this online learning environment, including having video on during class time, muting and managing sound appropriately from your mic, and being actively engaged and not distracted. Note that absences will negatively impact the ability to participate, so attendance does indirectly influence the Class Participation grade.

You are expected to actively participate in the course. Class participation makes classroom discussions and activities interesting, insightful, and fun. Students are expected to know the material, to have done the required classwork preparation, and to participate in a way that positively contributes to the classroom discussion. Participation will include the instructor calling on both individuals with virtual hands raised and random calling. Participation is encouraged, but there is no need to contribute to every discussion. Participation also includes participation in breakout exercises and within your project teams. Some of the best contributors are those who participate in a subset of sessions, but whose comments are insightful and compelling. The key issue is one of quality, not quantity. Participation which detracts from the learning environment will negatively impact the participation grade.

Students have different preferences with regards to participation. Some students will feel more comfortable speaking up in the full class sessions, while others prefer participating more actively in the breakouts. Participation points can be earned by contacting the instructor outside of class time, scheduling time in office hours, posting in canvas discussions, or presenting homework to the class.

The class participation grade will also incorporate self-evaluations at the end of each class and peer evaluations of each student's contribution to team projects at the end of the term.

Given that class participation is a large portion of the total grade, missing multiple class sessions may negatively impact this participation grade.

The Class Participation grade will be calibrated according to the Class Participation Rubric listed under the Class Participation Grade for Course Assignment.

<b>Class Participation Criteria</b>	<b>Points (20 Total)</b>			
Class Participation and Preparedness	<p><b>Excellent (18-20 points)</b></p> <p>Contributions during class and in classroom activities, breakouts, and discussions reflect exceptional preparation. Ideas offered are always substantive and provide one or more major insights as well as providing a fruitful direction for the class. Arguments are well-substantiated and persuasively presented. If this person were not a member of the class participating in class sessions, break-outs, and other course interactions, the quality of the discussions would be diminished significantly. Consistent submission of session surveys and self-evaluations. Treats students, instructor, and guest speakers with dignity and respect. Active listener. Appropriate</p>	<p><b>Good (15-17 points)</b></p> <p>Contributions during class and in classroom activities, breakouts, and discussions reflect good preparation. Ideas offered are usually substantive; provide good insights and sometimes a fruitful direction for class discussion. Arguments, when presented, are generally well-substantiated and are often persuasive. If this person were not a member of the class participating in class sessions, break-outs, and other course interactions, the quality of discussions would be diminished considerably. Regular submission of session surveys and self-evaluations. Overall good citizenship, but at least one instance when not showing respectful behavior or staying on task. Appropriate classroom etiquette during classroom sessions.</p>	<p><b>Satisfactory (10-14 points)</b></p> <p>Contributions during class and in classroom activities, breakouts, and discussions reflect satisfactory preparation. Ideas offered are sometimes substantive, provide generally useful insights, but seldom offer a major new direction for the discussion. Arguments are sometimes presented and persuasive. Spotty submissions of session surveys and self-evaluations. May include 1) more than one unexcused absence, 2) inconsistent or incomplete submissions of weekly class participation survey, 3) late or incomplete homework submissions.</p>	<p><b>Needs Improvement (0-10 points)</b></p> <p>Contributions during class and in classroom activities, breakouts, and discussions reflect inadequate preparation. Ideas offered are seldom substantive, provide few useful insights, and rarely offer a constructive direction for the class. Class contributions, whether during large class sessions or other course interactions, are few and far between. Many contributions are “cherry picking” efforts making isolated, obvious, or confusing points. Multiple instances when not prepared during classroom discussions, activities, team project work, and/or random calling. May include 1) more than one unexcused absence, 2)</p>

	classroom etiquette during classroom sessions or in other course interactions. Arrives to class on time.			inconsistent or incomplete submissions of weekly class participation survey, 3) late or incomplete homework submissions.
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## Mission/Vision Lesson

### Company Mission Statements Breakout Activity

1. Briefly research the company, pull up press releases, go to website to get more frame of reference. (Activity is based on updated mission statements published on company websites. The current mission statement may have changed from assigned reading article.)
  
2. Discuss these topics and questions:
  - Assess whether the mission statement aligns with the company's messaging and behavior
  - Based on what you know, see, and experience with regards to the brand, how does the company's behavior and public perception align with the mission statement?
  - Does the company's mission statement well represent how the company behaves and is perceived?
  - Give examples of what the company does to reinforce their mission. Give examples of perceived detractors to the mission.

Teams pick 1 student to share topics discussed in the breakout with class for class discussion. (Some groups, but not all, will be asked to share thoughts and takeaways.)

## Ideal Customer Profile Lesson

### Ideal Customer Profile Worksheet

*Ask the right questions to determine the ideal customer attributes*

Who is the Ideal Buyer?

*Map out the ideal customer profile. Key attributes may include industry/vertical, market cap, Size of company, annual revenues, geography, strategic priority alignment, executive sponsorship, functional group, use cases addressed, available budget, project timeline, and number of employees needing solution. (There may be multiple buyer personas, meaning multiple buyers and multiple Ideal Customer Profiles)*

What is the ideal company profile?

- 1) What industry?
- 2) What vertical?
- 3) What functional area?
- 4) Size of company - Revenues?
- 5) Size of company - Number of employees?

Use Case?

- 1) What is the company's problem?
- 2) What are the use cases that the company would like to address?

Who is the buyer contact/sponsor?

- 1) Who is the customer contact?
- 2) What are target departments or business units?
- 3) What is the title and level of seniority of the contact?
- 4) What responsibilities/tasks does the ideal customer have?
- 5) How does the contact align with what is needed in a customer champion?
- 6) Who are the various influencers and parties involved in making a decision?

Company Demographics/Geography?

- 1) Where is your contact located?
- 2) Where is the customer headquartered?
- 3) What is the company's main language?
- 4) What languages does the company need supported?
- 5) Does the customer need localization? If so, for what languages?
- 6) Where does the customer need local engagement and support?

Budget?

- 1) Does the company have an allocated budget category for the purchase?
- 2) Does the company have available budget?
- 3) If no budget allocated, is there a means to get funding?

Project Scope?

- 1) Does the company have a defined project with owner, timeline, and budget?
- 2) What is the priority of the company project?
- 3) Does the project requirements match what your product can do?
- 4) How many users will be part of the use case?

Project Timeline?

- 1) Does the company have a definitive timeline?
- 2) Is there a critical need for the project to stay on schedule?
- 3) When is the implementation date for the project?

Competition?

- 1) What are the other options the company has for addressing the problem?
- 2) How does your product/solution address the problem compared to the other options?



**<Company Name>**  
**Ideal Customer Profile Template**

<b>Ideal Customer Profile Summary</b> <i>Should be concise 1-3 sentence summary of ICP, incorporating most critical attributes and components on this document</i>	<i>Write high-level summary of ICP</i>
<b>Target ICP Profile &amp; Demographics?</b> <i>What Industry?</i> <i>Customer Size – Revenue &amp; Employees?</i> <i>Where is the Customer Located?</i> <i>Other?</i>	<ul style="list-style-type: none"> <li>•</li> <li>•</li> <li>•</li> <li>•</li> <li>•</li> </ul>
<b>Ideal Use Case(s)?</b> <i>What’s the customer’s problem?</i> <i>What are the use cases that best align with the company’s offerings?</i>	<ul style="list-style-type: none"> <li>•</li> <li>•</li> <li>•</li> <li>•</li> </ul>
<b>Ideal Buyer Contact/Sponsor?</b> <i>Who is the ideal buyer?</i> <i>Ideal Title? Role? Function?</i> <i>What key people need to be involved in decision?</i>	<ul style="list-style-type: none"> <li>•</li> <li>•</li> <li>•</li> <li>•</li> <li>•</li> </ul>
<b>Budget &amp; Timeline?</b> <i>Does prospect have identified project?</i> <i>Does project have associated budget and timeline?</i> <i>What is required budget?</i> <i>What are ideal implementation/timeline req’ts?</i>	<ul style="list-style-type: none"> <li>•</li> <li>•</li> <li>•</li> <li>•</li> <li>•</li> <li>•</li> </ul>
<b>Competition</b> <i>What are key competitive differentiators that ideal prospect should want over competitive offerings?</i>	<ul style="list-style-type: none"> <li>•</li> <li>•</li> <li>•</li> <li>•</li> </ul>
<b>Other ICP Attributes?</b>	<ul style="list-style-type: none"> <li>•</li> <li>•</li> </ul>
<b>10 Discovery Questions for Sales to Qualify Prospects Against ICP?</b> <i>Questions should be comprehensive to assess all critical attributes of ICP. Open-ended questions are better than closed-ended. Look at main ICP characteristics above and assess if questions listed will flush out key attributes that align with the prospects with highest propensity to buy.</i>	<ul style="list-style-type: none"> <li><input type="checkbox"/></li> <li><input type="checkbox"/></li> <li><input type="checkbox"/></li> <li><input type="checkbox"/></li> <li><input type="checkbox"/></li> <li><input type="checkbox"/></li> <li><input type="checkbox"/></li> <li><input type="checkbox"/></li> <li><input type="checkbox"/></li> <li><input type="checkbox"/></li> </ul>

## **Ideal Customer Profile Exercise**

*Ask the right questions to determine the ideal customer attributes*

### ***Who is the ideal customer?***

Map and document your company's Ideal Customer Profile (ICP). Use the Ideal Customer Profile Worksheet for a sample list of questions. This is an individual, not a team, assignment.

Key customer attributes may include industry/vertical, size and annual revenues, geography, strategic priority alignment, executive sponsorship, functional group, use cases addressed, available budget, project timeline, and number of employees needing solution. After identifying the attributes of the ideal customer, summarize the Ideal Customer Profile on the Ideal Customer Profile worksheet. This usually can be done in a few sentences. Sometimes there are multiple Ideal Customer Profiles. If that is the case, select one customer type to profile in this exercise.

## Differentiated Value Proposition Lesson

### Differentiated Value Proposition

- Value Propositions need to incorporate your why
- Most companies only talk about what and how in value propositions. Hard to differentiate from the competition
- If just talk about features and functions – can look at all competitive websites, and they look very similar. Sometimes can become the only differentiator is price. Then the product becomes a commodity.
- Need to tie back to mission and vision. To the core values. To the company story. To the why. Then much easier to explain the differentiated value propositions.
- Usually a handful of these. 3-6 differentiated value propositions.
- Ensure these are differentiated. Value propositions can't just be any old value propositions, they must be unique to you. They are differentiated.
- If you do your job correctly, you provide thought leadership in a challenger way. You tell your story, your why. You paint the picture. You talk about what is important and why. You highlight your differentiated value propositions.
- If the prospect/customer believes what you believe, they will believe that your value propositions are important. If you tell the story the right way, you will highly differentiators that nobody else has.
- This is how you sell. You paint the picture. They buy into the picture. You explain the status quo that needs to be changed. They buy into this too. In order to effectively change the status quo, you explain what is necessary. If you do this the right way, the challenger way, what needs to be changed exactly maps to your differentiated value propositions.

## Ideal Seller Profile Lesson

### Ideal Seller Profile Worksheet

1. What sales motion will Seller use? (Enterprise/Field? Inside/High-Velocity? Channel?)
2. What is the ideal work experience for the seller?
  - a. Years of sales experience?
  - b. Sales motion experience?
  - c. Stage of company? (Start-up? Big Enterprise?)
  - d. Ideal seller type? (Relationship? Challenger?)
  - e. Sales Cycle Length?
  - f. Average Order Size (AOS)? (What deal size experience?)
  - g. Vertical? Industry?
  - h. Feature/Function versus More Complex Solution sale?
  - i. Experience selling to the Ideal Customer Profile?
3. Where should the seller be based geographically?
4. What are travel requirements and outside of normal work hours commitments for this sales position?
5. Ideal behavioral traits? (*Pick top 10*)

Accountable	EQ	Positive Attitude
Adaptable	Flexible	Problem Solver
Ambitious	Focused	Relationship Builder
Assertive	Goal-oriented	Resilient
Builder	Good Communicator	Respectful
Challenger	Good Listener	Responsible
Charismatic	Hard-Working	Risk-Taker
Coachable	Honest	Self-Aware
Committed	Hungry	Self-Motivated
Competitive	Independent	Smart
Confident	Innovative	Team Player
Curious	Integrity	Time Management
Customer-Centric	Low Ego	Tenacious
Determined	Owner	Thought Leader
Disciplined	Organized	Other:
Embraces Failure	Passionate	Other:
Empathetic	Patient	Other:
Entrepreneurial	People Skills	
Enthusiastic	Persistent	

**<Company Name>**  
**Ideal Seller Profile Template**

<b>Ideal Seller Profile Summary</b> <i>Should be concise 1-3 sentence summary of ISP, incorporating most critical attributes and components on this document</i>	
<b>Sales Motion Desired? (i.e. Outside/Field, Inside, Hybrid, other)</b>	<ul style="list-style-type: none"> <li>•</li> </ul>
<b>Ideal Seller Work/Resume Experience?</b> Sales Motion? Years of Sales? Company Size/Stage? Seller Style? (Relationship-seller, Hard-worker, Challenger?) Deal Size? Sales Cycle Length? Prior Customer Focus? (Vertical? Industry?) Title/Role? Customer Type? Feature/Function vs. Solution Sale? Other?	<ul style="list-style-type: none"> <li>•</li> <li>•</li> <li>•</li> <li>•</li> <li>•</li> <li>•</li> <li>•</li> <li>•</li> <li>•</li> <li>•</li> <li>•</li> <li>•</li> <li>•</li> </ul>
<b>Top 10 Behavioral Traits?</b>	<ul style="list-style-type: none"> <li><input type="checkbox"/></li> <li><input type="checkbox"/></li> <li><input type="checkbox"/></li> <li><input type="checkbox"/></li> <li><input type="checkbox"/></li> <li><input type="checkbox"/></li> <li><input type="checkbox"/></li> <li><input type="checkbox"/></li> <li><input type="checkbox"/></li> <li><input type="checkbox"/></li> </ul>
<b>Location and Travel Requirements?</b> Ideal geographic location? Willingness/Ability to Travel What % of Time?	<ul style="list-style-type: none"> <li>•</li> <li>•</li> <li>•</li> </ul>
<b>Other Ideal Seller Attributes/Traits?</b>	<ul style="list-style-type: none"> <li>•</li> <li>•</li> <li>•</li> <li>•</li> </ul>
<b>At least 10 Interview Questions to qualify sales candidates against Ideal Seller Profile?</b>	<ul style="list-style-type: none"> <li><input type="checkbox"/></li> <li><input type="checkbox"/></li> <li><input type="checkbox"/></li> <li><input type="checkbox"/></li> <li><input type="checkbox"/></li> <li><input type="checkbox"/></li> <li><input type="checkbox"/></li> <li><input type="checkbox"/></li> <li><input type="checkbox"/></li> <li><input type="checkbox"/></li> </ul>

### **Ideal Seller Profile (ISP) Breakout Prompts**

- What are the key attributes of your company's Ideal Seller Profile? (There may be multiple ISPs for different sales motions and customer personas)
- What are the most important experience and skills attributes? What are the most important behavioral traits?
- What are the best questions to assess a candidate's fit against the ISP for both experience/resume, as well as behavioral traits?

## **Sales Motions Lesson**

### **Sales Motions Team Breakout Prompts**

- What are the sales motions used by our company? (Inside, Outside, Channel, Freemium?)
- Why are these sales motions used?
- How do these motions work to best target and address the company's ICP?
- How do the sales motions align with the company's Go-To-Market Strategy?

## Sales Operations Breakout Prompts

For your sales audit, you'll need to include a short overview of the various sales operations functions. These questions below should each be answered in the final project. Use this breakout as you'd like to make progress on this Sales Ops portion by focusing on one or multiple of these prompts.

- What is company's sales organizational structure and why?
- How does company do sales planning?
- What are key components of company's sales incentive compensation which help align and reinforce company goals?
- Review some sales processes and tools used by company?
- What are the key sales metrics and KPIs? Why are these important?
- How does company leverage sales enablement to accelerate progress towards sales goals?
- What questions should team ask during remaining company employee interviews to learn more about Sales Ops?



## **Integrated Go-To-Market and Sales Strategy Breakout Prompts**

The last section of the sales audit includes a final assessment of your company's overarching go-to-market and sales strategy. This section should provide a thorough assessment and critique of the effectiveness of the company's strategy in relation to principles learned in this course. This assessment should incorporate how the mission/vision/core values and multiple other sales audit criteria (company story, differentiated value proposition, Ideal Customer Profile, sales motions, Ideal Seller Profile, or Sales Ops Functions) factor into the company's integrated strategy and execution. During this final class breakout, your team should review the following questions to refine your overall assessment of how integrated the strategy is, what is good, and what needs improvement. During this session, you may want to review outstanding questions that need to be answered or research that needs to be done prior to submitting the assignment. (The discussion boards may provide additional ideas on resources and questions)

- How does your team rate the overall effectiveness of company's integrated Go-To-Market & Sales Strategy?
- What are the strongest components of company's GTM & Sales Strategy?
- What are the weakest components of company's GTM & Sales Strategy?
- What outstanding questions and research does team need to complete before finishing sales audit?

## Final Sales Audit Project

### *Final Team Project Due Session 5: Sales Audit (Final Written Paper and Oral Presentation)*

The Final Project will consist of a “Sales Audit” for a company that has a professional sales organization. The team project will involve selecting a company, doing research and investigation on the company’s Go-To-Market & Sales Strategy, sales practices, and sales structure. Teams will do research leveraging the company’s website, marketing materials, publicly available information, and interviews with people associated with the organization to best understand the company’s approach. Project teams will be finalized by the start of Session 2. The Sales Audit includes both a written report and an oral team presentation, including a recorded video.

Teams will be comprised of self-organized teams. Teams will submit a request for the final project company, and companies will be approved and assigned on a first come, first served basis. Each team will be required to select a company that meets these requirements:

- Has a published vision and/or mission statement on corporate website
- Has published core values on corporate website
- Has at least one product or service currently sold in the market
- Has a sales organization with a direct sales force

The audit should address topics covered in the class, which may include (but are not limited to) the following:

- Company Vision and/or Mission
- Company Core Values
- Company Story
- Differentiated Value Proposition
- Ideal Customer Profile
- Sales Motion(s)
- Ideal Seller Profile
- Sales Operations Functions: Sales Organizational Structure, Sales Planning & Compensation, Sales Processes & Tools, Sales Metrics, and Sales Enablement
- Integrated Go-To-Market Strategy Assessment

Your audit will include your team’s overall assessment on the effectiveness of your company’s go-to-market and sales strategy in relation to the principles taught in this course.

Have fun with this project! The last section, your Integrated Go-To-Market Strategy Assessment, could be a grade, a rating, a list of pros/cons, a review of what was done well and what could be done better, a reflection on what works and what doesn’t work, or however else you want to summarize your team’s assessment.

Include references used in your written report at the end of the written report. Each team must have at least 5 sources. Sources may include your own research on the

company's website, books, articles, and/or interviews with current or former company staff. Refer to List of Resources/Research Ideas for Sales Audit for research ideas.

The final oral presentation will showcase each team's project for the rest of the class, summarizing course principles into practical, applied learnings and takeaways. The Sales Audit Presentation should provide a summarized Go-To-Market & Sales Strategy Assessment based on the rubric criteria. Thorough assessment and critique should cover the effectiveness of company's Go-To-Market Strategy in relation to the principles learned in this course, incorporating how the mission/vision/values and at least 4 other Sales Audit rubric criteria factor into the company's overarching Go-To-Market Strategy.

**Video Requirements:**

- 5 Minute Time Limit
- Video format should be Zoom recording downloadable file or YouTube
- Each team can decide ideal participation format for this video. Teams can choose to have just one student present, all team members participate, or whatever team prefers.

This video will be graded as one of the categories on the final Sales Audit rubric. These videos will showcase each team's project for the rest of the class to summarize the course principles into practical, applied learnings and takeaways. Video will be cut at 5 minutes, so if video is longer than 5 minutes, only the first 5 minutes will be shown.

Total oral presentation length is 10 minutes maximum: 3-5 minute recorded video and up to 5 minutes for class Q&A. After video is shown to the entire class, the team will lead class Q&A for up to 5 minutes. Teams can choose to have just one student lead class Q&A, have all team members participate, or whatever team prefers. Team members participating in the oral presentation class Q&A portion will come to the front of class for class discussion. Q&A portion will be limited to 5 minutes maximum.

<b>Final Sales Team Audit</b>	<b>Points (100 Total)</b>			
<b>Written Report</b>	<b>Points (90 of 100 total)</b>			
Company Vision and/or Mission (10 points)	Excellent (9-10 points)  Description of company with overview of what company does, products and services it provides, and company vision and/or mission with thorough	Good (7-8 points)  Description of company with overview of what company does, products and services it provides, and company vision and/or mission with basic	Incomplete (4-6 points)  Description of company with overview of what company does, products and services it provides, and company vision and/or mission. Incomplete	Needs Improvement (0-3 points)  Missing or incomplete company vision and/or mission and missing description of how the vision and/or mission is representative of the

	description and explanation of how the vision and/or mission is representative of the company's true north	description of how the vision and/or mission is representative of the company's true north	explanation of how the vision and/or mission is representative of the company's true north	company's true north
Company Values and Culture (10 points)	Excellent (9-10 points)  Lists company's core values, a full review of their impact on company culture, and a description of how the core values are integrated into daily employee and team behavior and performance management	Good (7-8 points)  Lists company's core values and full review of their impact on the company culture	Incomplete (4-6 points)  Lists company's core values and bare definition of impact on company culture	Needs Improvement (0-3 points)  Missing or incomplete company core values and culture explanation
Company Story (5 points)	Excellent (5 points)  Explanation of the company founding story, incorporating the differentiated value proposition, the "why" this is important, packaged in a way that could be used to provide thought leadership to the space, prospects, and customers	Good (3-4 points)  Explanation of the company founding story, incorporating the differentiated value proposition and the "why" this is important	Incomplete (1-2 points)  Incomplete explanation of the company founding story or rough outline without full company story	Missing (0 points)  Company story missing
Differentiated Value Proposition (10 points)	Excellent (9-10 points)  Thorough explanation of the differentiated value proposition highlighting not only the differentiators but also why this matters to the prospect/customer and how they provide unique and differentiated competitive advantages over other competitive options	Good (7-8 points)  Detailed explanation of the differentiated value proposition and why this matters to the prospect/customer	Satisfactory (4-6 points)  General overview of differentiated value proposition	Needs Improvement (0-3 points)  Lacking clear differentiated value proposition

<p>Ideal Customer Profile</p> <p>Use provided Ideal Customer Profile Template (10 points)</p>	<p>Excellent (9-10 points)</p> <p>Comprehensive list of Ideal Customer Profile attributes including many factors in target company Demographics and Needs along with a list of at least 10 open-ended discovery questions to ask prospects to help qualify customer attributes and measure the prospect's fit with ICP propensity to buy</p>	<p>Good (7-8 points)</p> <p>Thorough list of Ideal Customer Profile attributes including many factors in Customer Demographics and Needs</p>	<p>Satisfactory (4-6 points)</p> <p>Basic of Ideal Customer Profile attributes</p>	<p>Needs Improvement (0-3 points)</p> <p>Lacking Ideal Customer Profile</p>
<p>Sales Motion(s) (10 points)</p>	<p>Excellent (9-10 points)</p> <p>Comprehensive explanation of sales motion(s), including why the motions are used, and an assessment as to whether the motions are the best way to address the Ideal Customer Profile and align with the company's go-to-market strategy</p>	<p>Good (7-8 points)</p> <p>Thorough explanation of sales motion(s) used, including why the company leverages such motions</p>	<p>Incomplete (4-6 points)</p> <p>Basic explanation of sales motion(s) used</p>	<p>Needs Improvement (0-3 points)</p> <p>Lacking sufficient definition or explanation of sales motion(s)</p>
<p>Ideal Seller Profile</p> <p>Use provided Ideal Seller Profile Template (10 points)</p>	<p>Excellent (9-10 points)</p> <p>Comprehensive list of Ideal Seller Profile attributes including explanation as to why Seller Profile aligns with the company's Go-To-Market strategy and list of interview questions to qualify prospective sales candidates</p>	<p>Good (7-8 points)</p> <p>Thorough list of Ideal Seller Profile attributes including explanation as to why Seller Profile aligns with the company's Go-To-Market strategy with limited questions</p>	<p>Incomplete (4-6 points)</p> <p>Basic explanation of Ideal Seller Profile with minimal questions</p>	<p>Needs Improvement (0-3 points)</p> <p>Lacking Ideal Seller Profile with no questions</p>

<p>Sales Operations Overview (10 points)</p>	<p>Excellent (9-10 points)  Coverage of all five Sales Operations Functions, including Sales Organizational Structure, elements of and/or factors considered in Sales Planning &amp; Compensation, description of at least one key Sales Process and/or Tool, explanation of at least one Sales Metrics for tracking or measuring performance, and explanation of approach or at least one program within Sales Enablement</p>	<p>Good (7-8 points)  Coverage of four Sales Operations Functions, including Sales Organizational Structure, elements of and/or factors considered in Sales Planning &amp; Compensation, description of at least one key Sales Process and/or Tool, explanation of at least one Sales Metrics for tracking or measuring performance, and explanation of approach or at least one program within Sales Enablement</p>	<p>Incomplete (4-6 points)  Coverage of three Sales Operations Functions, including Sales Organizational Structure, elements of and/or factors considered in Sales Planning &amp; Compensation, description of at least one key Sales Process and/or Tool, explanation of at least one Sales Metrics for tracking or measuring performance, and explanation of approach or at least one program within Sales Enablement</p>	<p>Needs Improvement (0-3 points)  Coverage of two or less Sales Operations Functions, including Sales Organizational Structure, elements of and/or factors considered in Sales Planning &amp; Compensation, description of at least one key Sales Process and/or Tool, explanation of at least one Sales Metrics for tracking or measuring performance, and explanation of approach or at least one program within Sales Enablement</p>
<p>Audit Assessment of Go-To-Market Strategy (10 points)  (Assessment of company's overarching go-to-market strategy encompassing all the elements of the course.)</p>	<p>Excellent (9-10 points)  Thorough assessment and critique of the effectiveness of company's Go-To-Market Strategy in relation to the principles learned in this course, incorporating how the mission/vision/values and at least 4 other Sales Audit rubric criteria factor into the company's overarching Go-To-Market Strategy.</p>	<p>Good (7-8 points)  Good assessment and critique of the effectiveness of company's Go-To-Market Strategy in relation to the principles learned in this course, incorporating how the mission/vision/values and at least 2-3 other Sales Audit rubric criteria factor into the company's overarching Go-To-Market Strategy.</p>	<p>Incomplete (4-6 points)  Basic assessment of the effectiveness of company's Go-To-Market Strategy in relation to the principles learned in this course, incorporating how the mission/vision/values but missing tie-ins with adequate examples of how the other Sales Audit rubric criteria factor into the company's overarching Go-To-Market Strategy.</p>	<p>Needs Improvement (0-3 points)  Incomplete assessment of the effectiveness of company's Go-To-Market Strategy in relation to the principles learned in this course. Poor tie-ins back to mission/vision/values or additional elements of the Sales Audit criteria incorporated into assessment.</p>
<p>References (5 points)</p>	<p>Excellent (5 points)  At least 5 references from various sources, including but not limited to the</p>	<p>Good (3-4 points)  At least 3-4 references from various sources, including but not limited to the</p>	<p>Incomplete (1-2 points)  1-2 references listed</p>	<p>Missing (0 points)  No references listed</p>

	company's website and marketing materials, books, articles, or interviews with current or prior company staff. Excellent rating requires at least 2 interviews with current or prior company staff	company's website and marketing materials, books, articles, or interviews with current or prior company staff or including 5 required references, but not from a variety of sources. Good rating requires at least one interview with current or prior company staff		
<b>Oral Presentation</b>	<b>Points (10 of 100 total)</b>			
<p>Final Team Sales Audit Video and Oral Presentation</p> <p>Total oral presentation length is 10 minutes maximum:</p> <p>3-5 minutes recorded video and up to 5 minutes of class Q&amp;A</p> <p>Team can decide number of presenters – can be as few as one or multiple</p> <p>(10 points)</p>	<p>Excellent (9-10 points)</p> <p>Excellent, organized, and engaging oral presentation within time limit that summarizes team's assessment of the company's overarching go-to-market and sales strategy, including all of the following:</p> <ul style="list-style-type: none"> <li>- Company Vision/Mission</li> <li>- Core Values/Culture</li> <li>- Company Story</li> <li>- Differentiated Value Propositions</li> <li>- Ideal Customer Profile</li> <li>- Ideal Seller Profile</li> </ul> <p>You may include other elements covered in the final written audit, but these above must be covered in the video presentation for full credit. Points will be deducted if video is</p>	<p>Good (7-8 points)</p> <p>Good oral presentation that summarizes team's assessment of the company's overarching go-to-market and sales strategy, including most of following:</p> <ul style="list-style-type: none"> <li>- Company Vision/Mission</li> <li>- Core Values/Culture</li> <li>- Company Story</li> <li>- Differentiated Value Propositions</li> <li>- Ideal Customer Profile</li> <li>- Ideal Seller Profile</li> </ul>	<p>Satisfactory (4-6 points)</p> <p>Satisfactory oral presentation that summarizes team assessment of the company's overarching go-to-market and sales strategy and includes at least 3 of the following:</p> <ul style="list-style-type: none"> <li>- Company Vision/Mission</li> <li>- Core Values/Culture</li> <li>- Company Story</li> <li>- Differentiated Value Propositions</li> <li>- Ideal Customer Profile</li> <li>- Ideal Seller Profile</li> </ul>	<p>Needs Improvement (0-3 points)</p> <p>Oral presentation missed key elements of summarizing team's assessment of the company's overarching go-to-market and sales strategy. Presentation could have been better structured and organized.</p>

	longer than 5 minutes or if total presentation runs over 10 minutes.			
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## Final Team Sales Audit Project

### Recorded Video Presentation and Project Team Discussion

The final oral presentation will showcase each team's project for the rest of the class, summarizing Mktg 579 course principles into practical, applied learnings and takeaways. The Sales Audit Recorded Video should provide a summarized assessment and critique of the effectiveness of the company's go-to-market & sales strategy in relation to core principles taught in the course. Video may provide an assessment of as many course principles as you'd like in the allotted time, so long as they cover these key principles:

- Company Vision/Mission
- Company Core Values/Culture
- Company Story
- Differentiated Value Propositions
- Ideal Customer Profile
- Ideal Seller Profile

Video Requirements:

- 5 Minute Time Limit
- Video format should be Zoom recording downloadable file or YouTube
- Each team can decide ideal participation format for this video. Teams can choose to have just one student present, all team members participate, or whatever team prefers

Total oral presentation length is 10 minutes maximum: 3-5 minutes recorded video and up to 5 minutes of class Q&A. After video is shown to class, the project team will lead class Q&A for up to 5 minutes. Teams can choose to have just one student lead class Q&A, have all team members participate, or whatever team prefers. Team members participating in the oral presentation class Q&A portion will come to the front of class for class discussion. Q&A portion will be limited to 5 minutes maximum.

Have fun with this project! Your assessment could be a grade, a rating, a list of pros/cons, a review of what was done well and what could be done better, a reflection on what works and what doesn't work, or however else you want to summarize your team's assessment. Before getting to the assessment portion of your video, your team will need to provide some basics and the overall context, covering mission/vision, core values, company story, differentiated values propositions, Ideal Customer Profile, Ideal Seller Profile, and whatever other points about Sales Motions, Sales Operations, or other principles covered in the course you'd like to cover. The context overview should be 3 minutes or less, leaving the remaining time to review your team's assessment.

For the open Q&A portion of each presentation, each project team will facilitate its own discussion, fielding questions from the class or asking prompts to facilitate discussion. Each team may want to assign a point person to manage the classroom discussion.

Instructor will be time-keeper, as each team will have a max of 10 minutes. If discussion ends earlier, we will move onto the next team.

The recorded video will be the main component of your team's Oral Presentation points on the Sales Audit rubric. Each member of the project team will receive the same grade for the video.

# CULTURE DRIVEN SALES & GO-TO-MARKET STRATEGY

## COURSEBOOK



Kelly Breslin Wright has over 30 years of experience in leadership, sales, operations, and strategy. Kelly has served in multiple executive roles, including as President and Chief Operating Officer at Gong and as Executive Vice President, Sales (Chief Revenue Officer) at Tableau Software, where she joined as the first salesperson and helped build Tableau into a multi-billion dollar public company growing revenues from zero to \$850m over 12 years. Kelly is currently Founder and CEO of Culture Driven Sales.

Kelly has been a Board Director at public and private companies, including Fastly (NYSE: FSLY), Plum (NASDAQ: PLMI), Gong, Lucid, Even, and Amperity. She has advised many technology companies, including Dropbox, Asana, data.world, Hyperproof, and Cien. She is an adjunct professor at the University of Washington's Foster School of Business.

Earlier in her career, Kelly spent time at Bain & Company, McKinsey & Company, Bank of America, Dale Carnegie Training, and AtHoc. She earned her BA from Stanford University and MBA from The Wharton School at the University of Pennsylvania.

