

2025 SBI SPRING REGIONAL SUMMIT

MAY 13-14, 2025 ATLANTA, GEORGIA

BLUEPRINT

for Sustainable Growth



Driven by Insights
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RevOps Growth Forum

Tech Optimization, Commercial Efficiency and Current Market Realities

May 13 2025

Tech Stack Optimization and Rationalization

Agenda

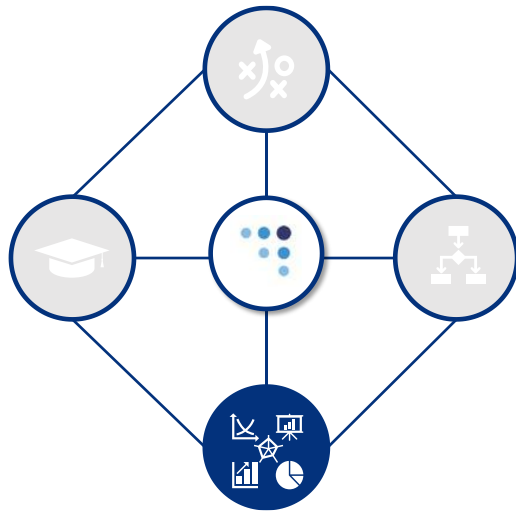
Commercial Efficiency Strategies Being Leveraged

Current State Market & Team Realities

1

Tech Stack Optimization and Rationalization

Generating insights and productivity lift from digital capabilities requires treating Revenue Operations and Technology as a strategic lever



Data & Insights

KPIs

1. ROI on GTM Tech
2. Lead to Close Conversion Rates
3. GRR and NRR

Revenue Operations	Revenue Technology Solutions across the Customer Lifecycle						
	Awareness & Demand Gen	Consideration & Evaluation	Decision & Contract	Implementation & Support	Value Realization	Renewal & Expansion	Feedback & Advocacy
RevOps Strategy							
RevOps Organization Design	Content Management	Opportunity Management	Self-Service Pricing Tools	Implementation Resource Planning	Customer Health Scoring	Account Planning & Management	Feedback Collection
RevOps Process Design & Optimization	Lead Nurturing & Enrichment	Demo & Trial Management	Contract, Price, Quote (CPQ)	Contact Channels (Call, Chat, Email)	Product Telemetry	Renewal Quoting & Administration	Public Product Roadmap
RevOps Management	Segmentation, Targeting & Personalization	Product & Company Sales Collateral	Reference Management	Support Ticketing & Case Management	Customer Enablement & Training	Next Best Product Recs	Customer & Partner Advisory Boards
	Lead Capture & Scoring	Value Selling & ROI Tools	E-Signature & Contact Lifecycle Mgmt.	Knowledge Base / AI-Powered Self-Service	QBR Tools and Automation		User Groups & Community Forums
	SEO & SEM Management	Competitive Intelligence & Collateral		Product Release Management			Advocacy Programs and Case Studies
	Email Marketing			Partner Portals & Support			

The time is now in 2025 to figure out your AI strategy

CEOs see AI's potential more in driving productivity gains than in delivering cost savings

Categories of Value Creation with AI

1. Improved Productivity

Generate better leads with improved contextualization, tailored account & persona engagement strategies & next-best actions

66%

2. Enriched Employee Experience

Automate tedious tasks, from accelerated research to note-taking, meeting recaps & adminivia (e.g., expense reporting)

58%

3. Reduced S&M Expense

Optimize resourcing cost by automating content development, from marketing collateral to proposals & enablement material

55%

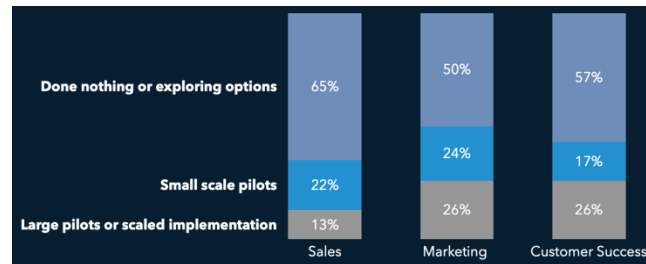
4. Enhanced Decision-Making

Enrich traditional KPIs with insights from unstructured data across disparate sources to inform resource allocation decisions

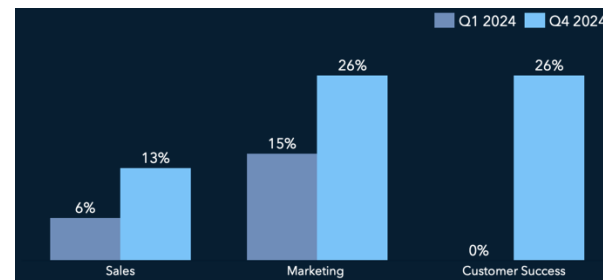
55%

Progress applying AI so far has been limited, but scaling happens fast

Generative AI Utilization Across the GTM organization

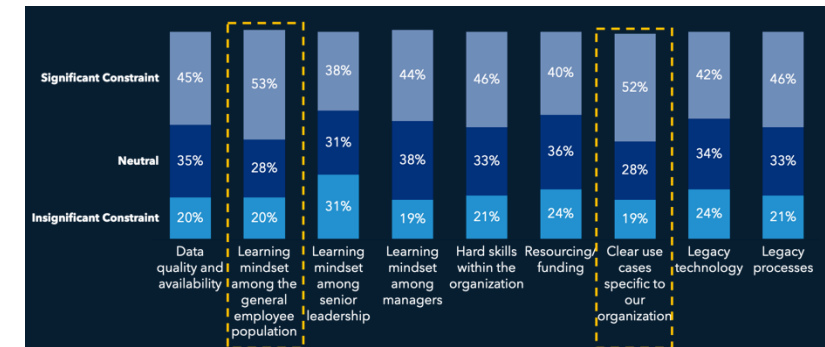


CEOs Reporting Large-Scale Pilots or Scaled Implementations of GenAI Q1 2024 vs Q4 2024

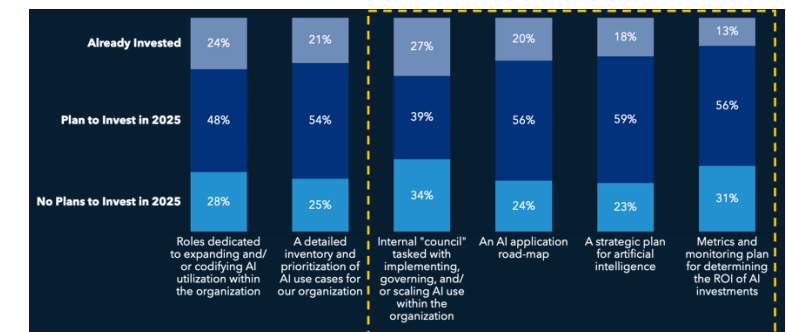


Despite use case uncertainty and legacy mindsets holding organizations back, CEOs are shifting from ideas for applying AI to strategic plans in 2025

CEO Ratings of Constraints to More Broadly Implementing AI in Their Organizations



CEO Investment/ Plans for Increasing Organizational Utilization of AI



Discussion topic 1: Tech stack optimization and rationalization

Process			Proficiency			Performance		
Prioritize	Engage	Win	Onboard	Coach	Enable	Measure	Plan	Manage
<i>How do we choose who to target</i>	<i>When and how do we engage with the client</i>	<i>How do we close deals</i>	<i>How do we prepare our teams</i>	<i>How do we support our teams</i>	<i>How do we help teams to perform</i>	<i>How do we measure performance</i>	<i>How do we allocate resources</i>	<i>How do we grow our business</i>
3 rd Party Data	Sales Engagement	CPQ	Sales Readiness	Conversation Intelligence	Content Management	CRM	Territory Management	CRM
Scoring Solutions	Scheduling	Reference Management	Simulation Tools	Call Recording	Digital Adoption	BI Solutions	Financial Planning	Forecasting
Purchase Intent	Demo Automation	Contracts / e-Signing	Micro-learning	Deal Coaching	Value Selling & ROI Tools	Account Insights	Account & Opportunity Planning	Gamification

Improvement project in flight (early stages)

LEVEL 1
UNDEFINED

LEVEL 2
DEFINED

LEVEL 3
IMPLEMENTED

LEVEL 4
MANAGED

LEVEL 5
PREDICTABLE

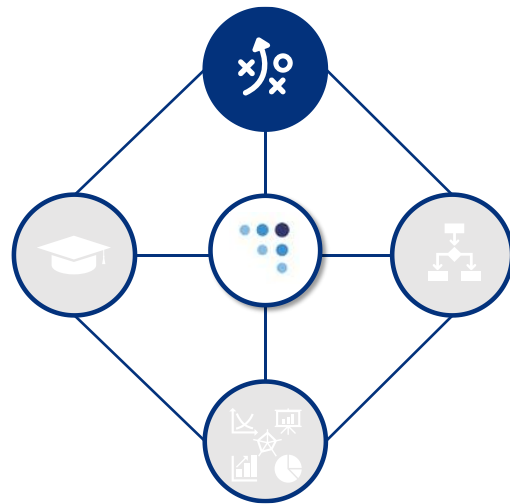
Group Discussion

- How are others deploying AI and / or exploring future-state AI into the Tech Stack?
- What learnings have come from recent optimization or rationalization efforts?
- How have Team's maintained data hygiene and systems governance?
- What has been your best advancement this year?

2

Commercial Efficiency Strategies Being Leveraged

Our approach recognizes that Growth Strategy is constantly shifting and evolving, often without clear alignment to function execution



Growth Strategy

Return on GTM KPIs

1. "Rule of"
2. Rate of Growth
3. EBITDA

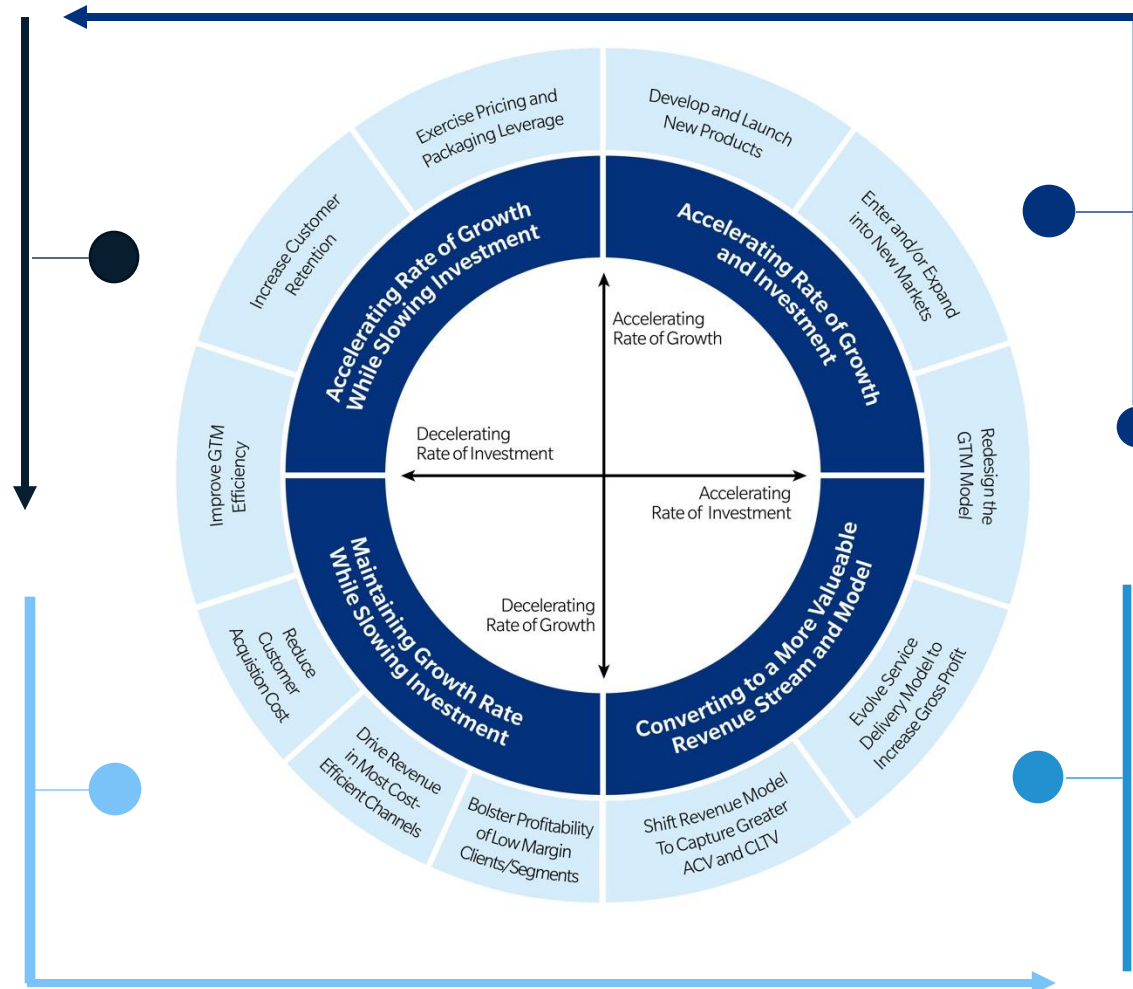
Growth Optimizers

"Rule of" performance moves upward through more efficient growth.

EBITDA Drivers

Focus on a "Rule of" based on driving significant EBITDA improvement, sacrificing some growth rate

SBI's Value Creation Compass



Growth Maximizers

Most companies start here: On the growth rate side of "Rule of" - growth at all costs.

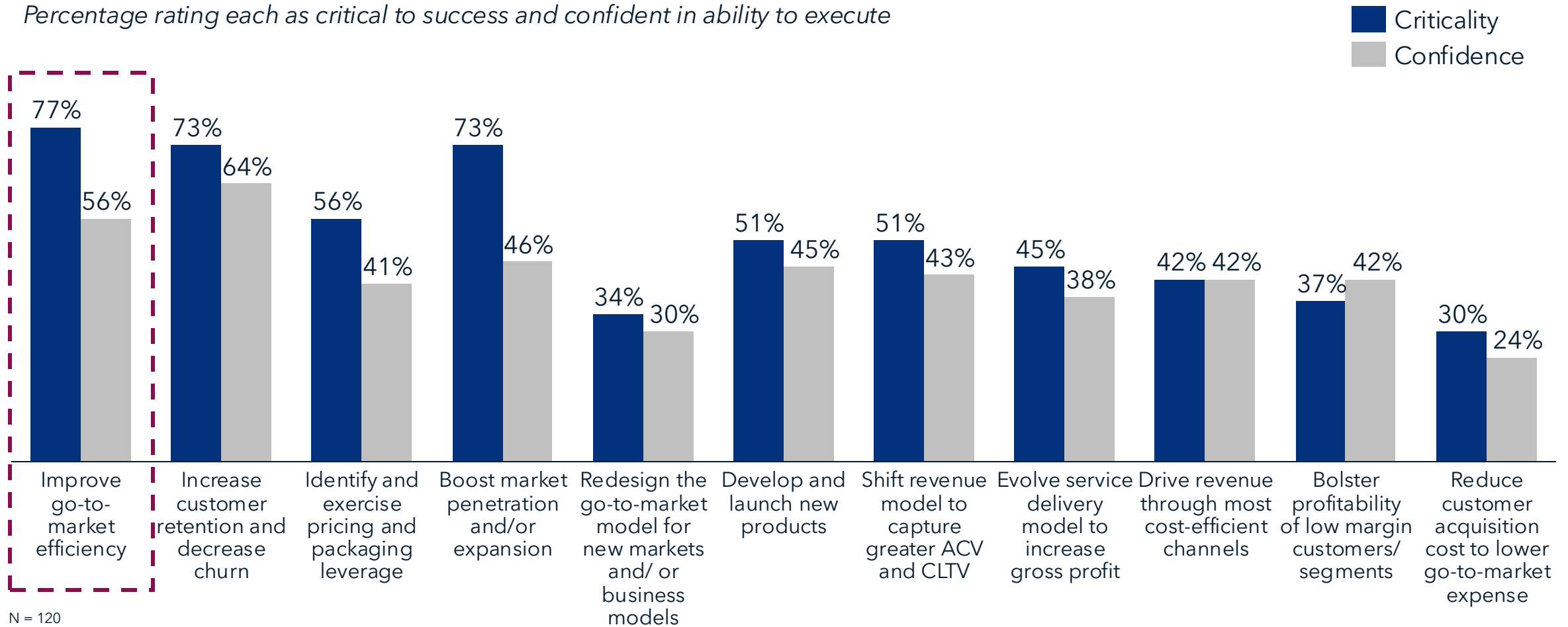
Value/Multiple Extenders

Mature companies that focus on stickier offerings, longer contracts, and predictable long-term revenue streams to drive valuation.

SBI's CEO Value Creation Pulse Survey uncovered confidence gaps with improving go-to-market efficiency

Criticality of and Execution Confidence in Levers for Value Creation

Percentage rating each as critical to success and confident in ability to execute



Source: SBI Q4 2024 CEO Survey

Discussion topic 2: Commercial efficiency initiatives remain at the forefront of GTM executive teams



Group Discussion

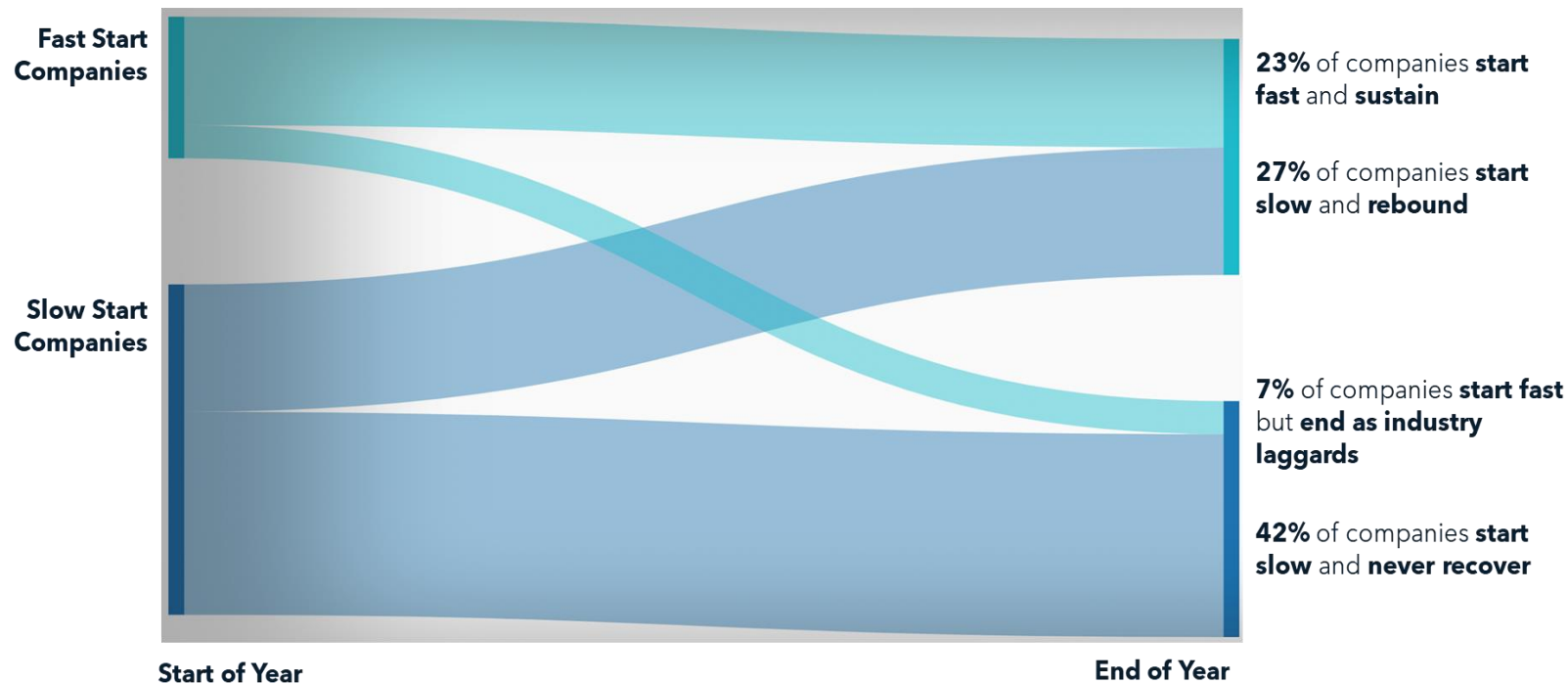
- What changes to the GTM strategy have been introduced in 2025 to drive efficiency?
- How have GTM teams have utilized pricing as an efficiency lever?
- Any shifts in Routes-to-Market for more favorable returns on spend?
- What internal enablement efforts have yielded early successes?

3

Current State Market Realities

Discussion topic 3: Navigating current state market realities

How Fast and Slow Start Companies End the Year



Group Discussion

- Any successful short-term programs over the past 3 Months?
- How are you looking at the next 6 Months?

The background features a series of thin blue lines forming a grid-like pattern. Several arrows are integrated into this pattern: one pointing up on the left, one pointing right in the middle, one pointing left on the left side, and one pointing up on the right side.

Networking Hour

Floor 8