



Ecosystems' Value Blueprint

I. Nascent - Value is atomized
(Value = Spreadsheet)

II. Emerging - Value is centralized
(Value = Expertise)

III. Established - Value is democratized
(Value = Methodology)

IV. Progressive - Value is systematized
(Value = Operating System)

V. Leading Edge - Value is productized
(Value = Product)

Value Strategy

Organizational Prioritization of Customer Value	Perceived importance of articulating customer value is highly variable	Perceived importance of articulating customer value is largely localized to value/enablers professionals (e.g., COE), exec team, and some front-line champions	Perceived importance of articulating customer value is consistently high across front-line sales or success team	Perceived importance of articulating customer value is consistently high across all customer facing teams. It is also equally high across all human and digital channels	Perceived importance of articulating value in customer terms is no longer a distinct priority as customer value serves as the primary mental model of entire organization practically, not just aspirationally
Value Management Process Maturity	No common definition or formalized process for value management	Value management processes are formalized, but largely localized to a few specialists or a center of excellence. Front-line teams are "receivers" of value initiatives	Value management strategy and process is understood and followed by front-line teams and coached consistently by managers	One consistent value management strategy and process is understood and followed by customer-facing teams across silo boundaries. It equally serves as the primary design principle for all digital customer experiences	Value management is built directly into the product experience itself. It is automated, accessible directly to customers on demand, in real time. Human-led "value reviews" are a supplemental, not primary, means to manage customer value
Scope of Organizational Capability	Ability to articulate value is a skill isolated among a small number of high-performing individuals or specialists	Value is an "expert-level" skill housed among specialists or a central team	Value as a common front-line capability	Value as an organizational discipline	Value is not just a human skill, but also a product attribute
Design of Value Narrative	Simple, Discrete: Focused on few value drivers provided by customer stakeholder(s) as part of "discovery, targeted to a specific commercial event (i.e., purchase, renewal, expansion)	Complex, Discrete: Spans more complex (including non-monetized) value drivers, targeted to a specific commercial "event" (i.e., purchase, renewal, expansion)	Guided, Discrete: Value narrative is co-created with customer based partly on supplier guidance around objectives and tactics, targeted to a specific commercial "event" (i.e., purchase, renewal, expansion)	Guided, Continuous: Value narrative is co-created with customer based partly on supplier guidance around objectives and tactics, spanning time, internal silos, and discrete commercial moments (e.g., sale, renewal, expansion) to frame a consistent, long-term, ongoing value-based customer relationship	Automated, Continuous: Value metrics are partly determined collaboratively and partly through predictive AI, using telemetry data, spanning time, internal silos, and discrete commercial moments (e.g., sale, renewal, expansion) to frame a consistent, long-term, ongoing value-based customer relationship
Executive Sponsorship of Value	Notional support from executive leadership for "articulating customer value"	C-suite officer or senior exec oversees value center of excellence	Chief Revenue/Commercial/Customer Officer champions clear discipline of value management, along with supporting training, coaching, enablement, and technology	Entire commercial executive team champions clearly articulated discipline of value management, spanning marketing, sales, customer success, account management, customer experience, revenue enablement, and customer service	Entire organizational leadership team supports customer value as core to company's DNA, including product, not just the GTM strategy

Value Execution

Working with Partners	Few (if any) organizational efforts to define combined customer value with partners, limited to one-off deals	Some centralized efforts to define value with select top-tier channel/distribution partners	Company-wide, consistent value story deeply integrated with vertical channel partners (i.e., vertical integration of value)	Co-created value-based stories and customer engagement with broader partner ecosystem (i.e., horizontal integration of value)	Combined offering across partner ecosystem that collects, calculates, and reports a single, seamlessly integrated value-based story across company boundaries
Targeting Criteria for Value Interactions	Select accounts based on individual sales/customer success rep's short-term priorities, needs, and skills	Most strategic or important customer accounts/opportunities based on capacity of centralized value team	All customers engage through a human channel (e.g., sales/success/service rep)	All customers irrespective of whether they interact with company through human or digital channels	Entire organizational ecosystem, including prospective and current customers, channel partners, and other providers
Timing of Value Engagement	Supplier engages prospect/customer reactively to prevent opportunity/account loss	Supplier engages prospects/customers proactively with value in one part of the customer lifecycle	Supplier engages customers proactively with value at multiple points across prospect/customer lifecycle	Supplier engages customers across entire lifecycle as part of one ongoing value conversation	Value is always on, providing a truly self-service experience
Value Discussion Lead	Individual expert (e.g., rep, SME, sales engineer)	Center of excellence/value engineering team	Frontline sales/customer success reps lead customer collaboration/conversation	Multilateral, via consistent cross-silo supplier guidance, community, and independent digital experience	Product experience guides customers through value experience
Customers' Value Experience	Value as Product: Value articulation is "delivered" to prospect/customer as a "product" (e.g., ROI, LTV, TCO document)	Value as Proposal: Value articulation is "proposed" to prospect/customer as an output of an internal analysis, designed to elicit feedback	Value as Collaboration: Value articulation is determined collaboratively by supplier and prospect/customer based on experience	Value as Journey: Customer experiences value as a continuous journey of learning	Value as Product Experience: Value definition/realization is so deeply embedded into ongoing product/service use that it becomes part of the customer experience itself, rather than just a way to measure it
Value Content Creation	Value content is created as needed for specific opportunities/accounts by individuals, based on personal expertise	Value content is created proactively for target segments by value specialists	Value content is created and tailored proactively for a wide range of customer segments combining specialist knowledge and front-line experience	Value content is created and tailored on an ongoing basis to drive consistent narratives from pre- to post-sale, spanning human and digital channels, and based on both deep customer research and practical experience	Value content is guided by AI, authored and distributed to customers directly within the product

Value Tools & Resources

Incremental Organizational Support for Value-Based Conversations	No organizational support	Centralized "value team"	Revenue enablement and manager coaching	Marketing content and digital experiences	Product design
Value Technology	No purpose-designed value tool	Purpose-built value tool used to generate customer-facing value modeling	Purpose-built value platform designed to facilitate supplier-customer agreement and tracking of value	Purpose-built value platform creating "institutional memory" of value promise/realization across both supplier and customer silos	Purpose-built value platform supported by deep integration of telemetry data, AI, ongoing, automated best-practice analysis, and prompts for "next-best-collaboration" between supplier and customer
Incremental Source of Value Discovery	Sales/customer success rep experience	Benchmarks and research	Supplier-Customer collaboration	Commercial insight	Artificial intelligence
Value Content Integration	Value assets (business cases, ROI documents, etc.) are not connected to one another or broadly accessible (e.g., via CRM)	Value assets created and available within company platform (e.g., LMS, CRM), independent of specific opportunities	Value assets are consistently linked to specific opportunities, enabling real-time insights on business impact, (e.g., influenced revenue, close rates)	Value assets comprise a continuous record across pre- and post-sale across Sales (CRM) and Customer Success (CSM) platforms	Value assets comprise a continuous record across entire account lifecycle, accessible by sales, customer success, and customers via an in-app experience

I. NASCENT TO II. EMERGING

- Collect the best examples of business cases and value-based content currently in use
- Root cause (including customer interviews) best practices and distill into common approach
- Enable broader business case application via technology/platform
- Train target front-line team on the “why” and “how” of customer value
- Identify “value champions” among early adopters to share learnings and early wins
- Build business case for resources dedicated to customer value
- Identify target accounts for value-based approach
- Hire/Designate leader of the value discipline, placing them as high as possible on the relevant team
- Identify and address potential overlaps, conflicts, and role confusion across internal stakeholders relative to new value approach
- Ensure senior leaders understand/support mandate of value team
- Connect value team leader with like-minded value professionals

II. EMERGING TO III. ESTABLISHED

- Establish and document clear agreement among senior (C-suite) leaders across objectives, tactics, metrics, targets, and timelines for scaling value-selling efforts
- Win buy-in of front-line managers, focusing on the “why,” “how,” and WIFM of scaling customer value efforts
- Ensure front-line managers:
 1. Understand the value of coaching
 2. Know how to coach
 3. Share a common organization process for coaching
 4. Know how to prioritize coaching opportunities and diagnose individual team members’ coaching needs
 5. Understanding specifically how to coach a value-based selling approach, using the organization’s specific value-selling platform
- Design a staged roll-out strategy to account for organizational capacity and change appetite
- Ensure target sellers understand the “why” of self-serve value efforts and are completely comfortable with the “how”
- Establish “help-desk” protocols and SLAs on responsiveness to ensure front-line sellers feel and understand support
- Determine whether members of the value team are willing and able to shift from “doing” value to “enabling” value
- Identify the appropriate technology to scale value-selling efforts to entire front line. Solve for:
 1. Ease-of-use in a self-serve context
 2. Customer preferences/priorities in value-based interactions
 3. Demonstrated commercial impact of output (focus on high impact/low drag)
 4. Ease of scalability to more users
 5. Ease of scalability to more functions (e.g., sales, success, marketing) and channels (e.g., channel partners, digital experience)
 6. Organizational learning potential
 7. Cost-per-user vs. impact-per-user
 8. Adaptability of platform to emerging technology (e.g., AI)
- Reinforce the importance of a consistent, company-wide value approach from the very top of the organization (CEO). Avoid “flavor-of-the-month syndrome” at all costs
- Socialize success regularly, both for learning and buy-in
- Don’t push for 100% adoption, but aim for 80%

III. ESTABLISHED TO IV. PROGRESSIVE

- Ensure CMO buy-in to priority of a value-based approach in company’s digital channels
- Use customer interviews to map customers’ digital buying journey and identify their value-related priorities during independent research
- Redesign digital experiences (including content) around interactive value exploration
- Design easy transitions for customers to move back and forth across digital and human channels during their value journey
- Identify and eliminate “blockage points” in the easy flow of customers’ value journey (e.g., what they’ve explored, prioritized, learned, discarded) across the human-digital divide and from silo to silo (e.g., sales, success)
- Ensure the entire end-to-end value journey is captured in a single, internal platform serving as the “authority” for every customers’ value journey
- Determine RACI model for prompting, monitoring, and acting on customers’ end-to-end value journey
- CEO and top executives serve as value champions to the entire organization (not just sales), regularly emphasizing its priority and seeking ways to improve execution

IV. PROGRESSIVE TO V. LEADING EDGE

- Ensure product team(s) are oriented to customer outcomes over product features
- Inventory telemetry data available for capture and prioritize according to potential value to customers
- Design a “narrative” around that data such that it represents a meaningful (to customers) story, and not just a list of numbers
- Design/deploy a user interface for conveying that narrative to customers in a compelling and easy-to-understand manner
- Design that user interface to be interactive, such that customers can cut data, troubleshoot, and scenario plan
- Embed capabilities to guide customers to the next-best way to realize incremental value (i.e., additional products/services)
- Design easy means for customers to move from product-based value interactions to human-based value interactions