

# Our Agenda



**01 /** Introductions



**02 /** What is Customer Benefit Analysis?



**03 /** Fullcast Case Study



**04 /** Q&A





# Welcome to the Future of RevOps.

Fullcast is the only platform that seamlessly connects your go-to-market planning activities with your tactical sales operations. Plan smarter, forecast better, and automate the execution of your plan instantly in Salesforce with the click of a button.



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**A Profit Stream is designed to serve customer segments with the highest profit potential.** This requires business leaders to quantify the value they can create for their customers.

**Customer Benefit Analysis** is a structured process designed to answer two key questions:



**What dimensions of our solution provide benefit to our customer?**



**What is the magnitude of these benefits to your customer?**

## Customer Benefit Analysis

captures the answers to these questions in a unified economic model based on **tangible** and **intangible** economic benefits.

①

## Tangible

Tangible benefits are established through objective analysis. The two main dimensions of tangible benefits are:

- ✦ Cutting costs
- ✦ Increasing revenue

②

## Intangible

Intangible benefits are established through subjective analysis and must be converted into an economic benefit. Intangible dimensions include such things as:

- ✦ Brand
- ✦ Customers who align with the company's social mission
- ✦ Making decisions more confidently by using the Profit Stream Canvas.



**Tangible benefits** can be captured through a verb that modifies a dimension of value relevant to your customer.

The two main verbs are  **REDUCE** and  **INCREASE**

Common pairings of verbs and dimensions can help you create your **Customer Benefit Analysis**

Other verbs you can explore for **REDUCE**:





Other verbs you can explore for **INCREASE**:



### Remember

A Customer Benefit Analysis is created from your Customer's perspective:

 How can I reduce my costs?

 How does our solution reduce our Customer's costs?



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Cost                      Your solution reduces direct or indirect cost

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Time                      Your solution reduces the time to complete a task

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Capital                      Your solution helps your customer reduce capital investment costs

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Compliance                      Your solution reduces your customer's compliance costs

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Risk                      Your solution reduces risk for your customer

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Effort                      Your solution reduces the effort required to accomplish a task

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Revenue

Your solution increases your customer's revenue!

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Productivity

Your solution helps your customer increase productivity

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Optionality

Your solution helps increase the number, type, or scope of options consumers may pursue

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Ease of Use

Your solution is easier to use than an alternative - which includes making your own solution easier to use

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Data

Software-Enabled Solutions that focus on data have unique, data-centric attributes

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**Maximize these...**

**Safety**

**Confidence**

**Security**

**Fun / Pleasure**

**Status**

**Creativity**

**Aesthetics**

**Minimize these...**

**Frustration**

**Fear / Anxiety**

**Loneliness**

**Stress**

Use **Dimension and Magnitude of Benefit** cards to capture the results of your Customer Benefit Analysis for each segment.

A short title makes managing collections of cards easier.

What is the value of the solution? Can you describe it as a narrative?

What is the economic impact of the benefit? How can it be measured?

Every Solution demands something from your customer. Even the app you download on your phone requires a phone.

Understanding the demands your solution places on your customer improves total cost of ownership analysis and helps you design more elegant solutions.

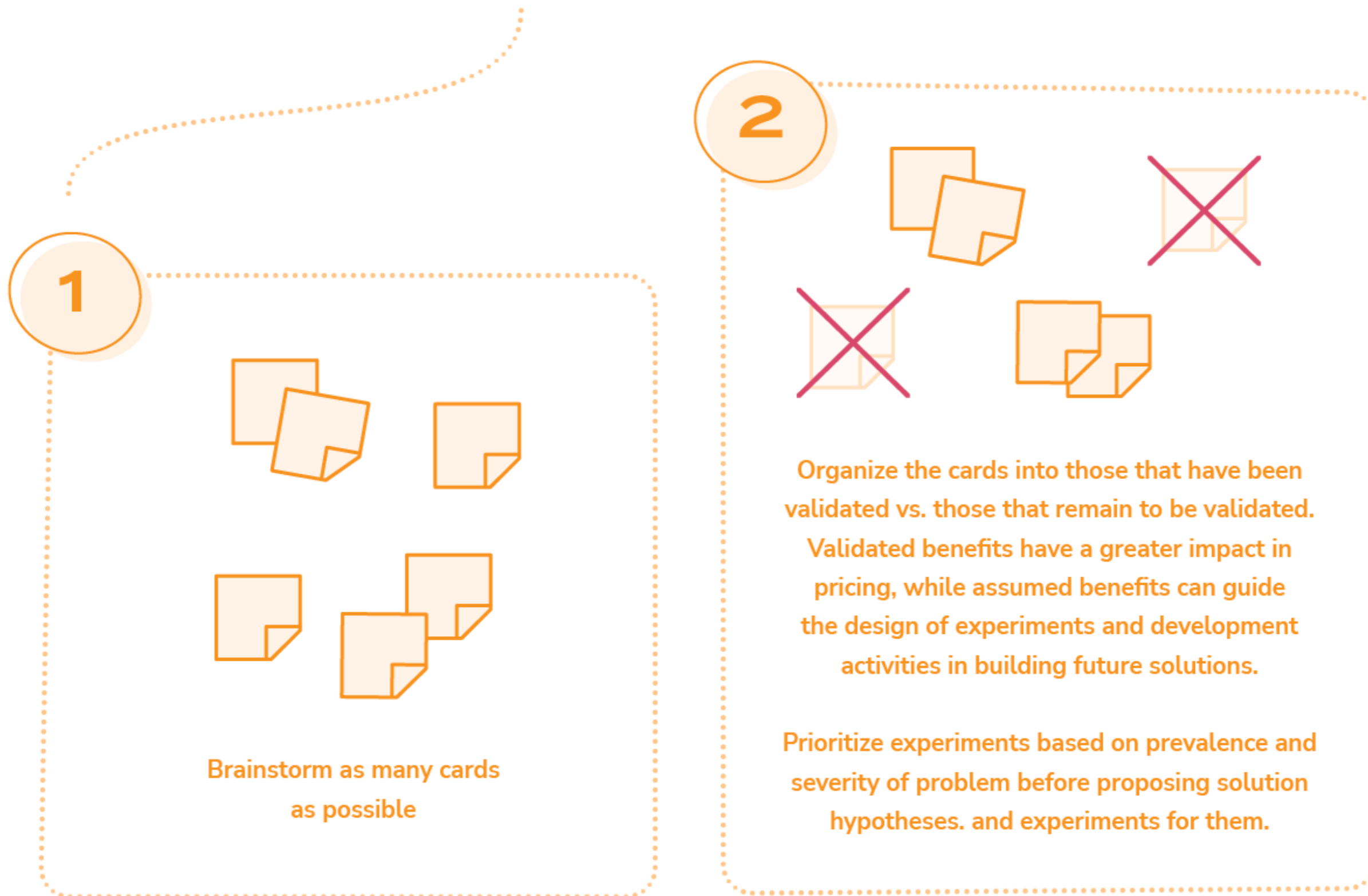
Title	
Who	
Dimension	
Magnitude	
Solution Demands / Costs	
<input type="checkbox"/> Tangible	_____
<input type="checkbox"/> Intangible	_____

Who is receiving the benefit? Clarifying the “who” helps maintain focus while also helping identify potential new segments.

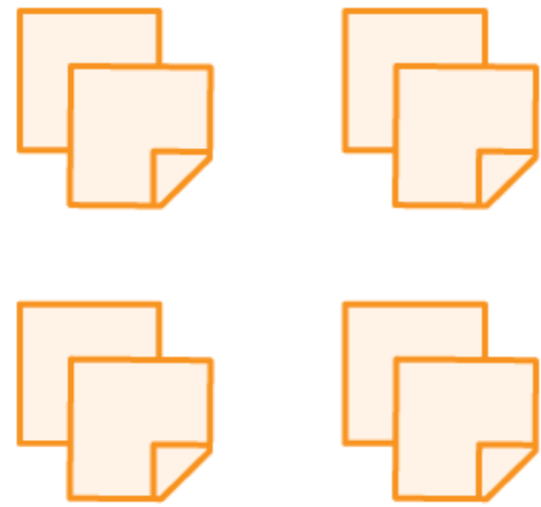
Expressing the magnitude of a tangible benefit in a financial formula makes pricing and financial modeling easier. Capturing the strength or importance of intangible benefits informs pricing strategies.

Organizing your cards by tangible and intangible benefits enables you to capture the total economic benefit of your solution.

# Identify as many **Dimension** **and Magnitude of Benefit** cards as possible:

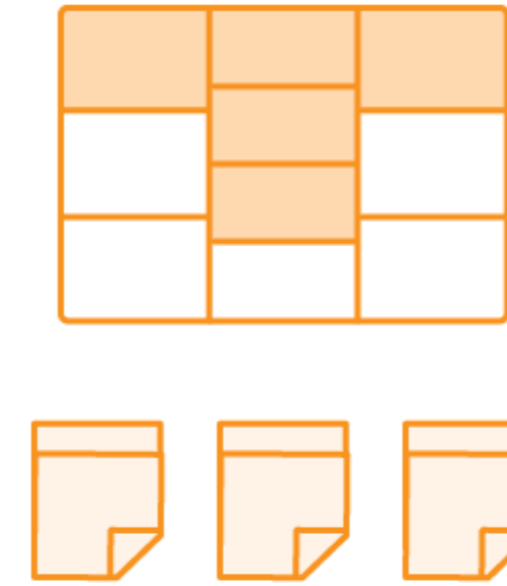


3



Consolidate similar cards and prioritize the remaining cards according to those benefits that provide the greatest economic value.

4



Use results in economic modeling & pricing

Adjust the structure of your cards to best reflect the **customer segments** you're serving.

Expensive B2C and most B2B solutions will be strongly influenced by tangible dimensions.

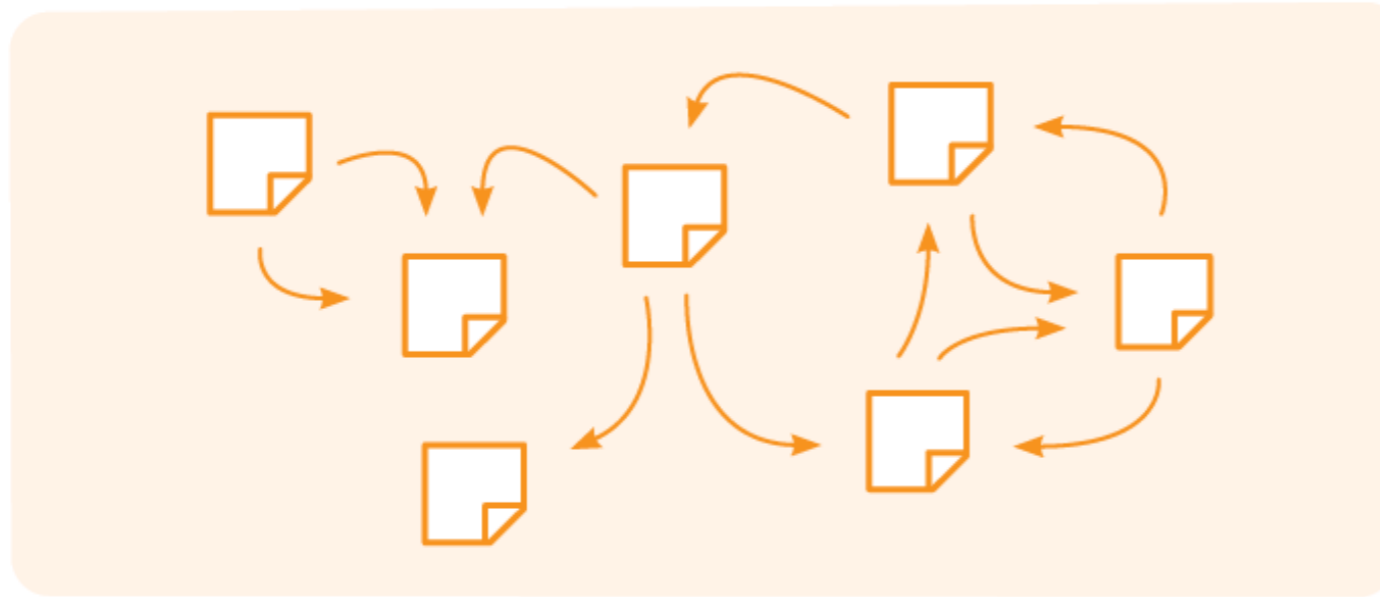
Inexpensive B2C and many B2P tools are strongly influenced by intangible dimensions.

We choose mobile games for fun!

Many professionals choose older solutions based on familiarity.

# Customer Benefit Analysis and Systems Thinking

To understand your system of value, draw relationships between **dimension** and **magnitude of benefit cards**.

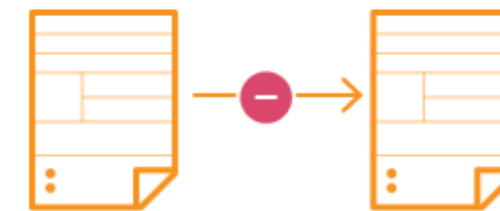


Whenever a dimension has an effect on another dimension, connect them with an arrow.

There are two kinds of causal links...



A plus sign means that the two benefits move in the same direction.



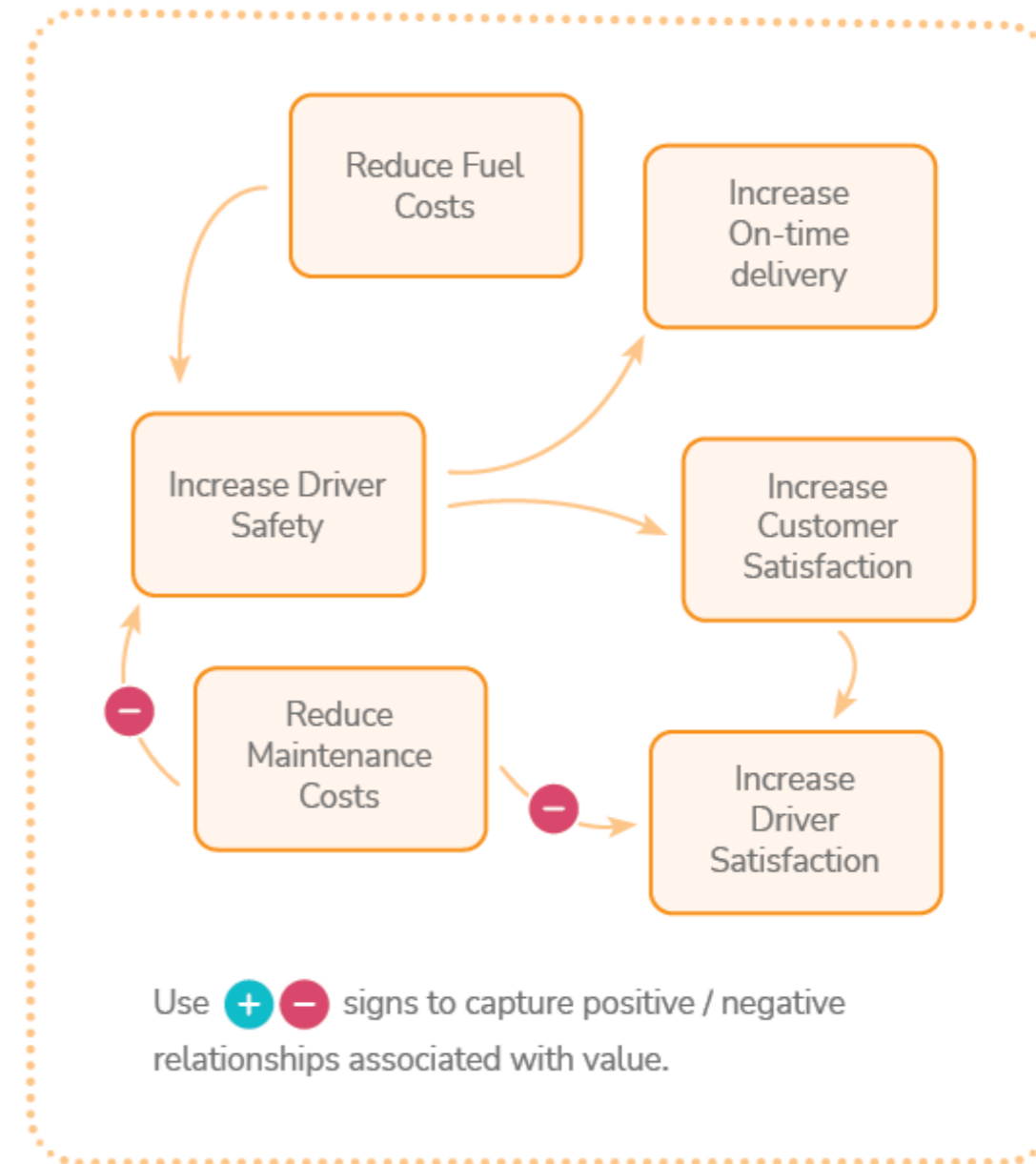
A minus sign means that the two benefits move in the opposite direction.



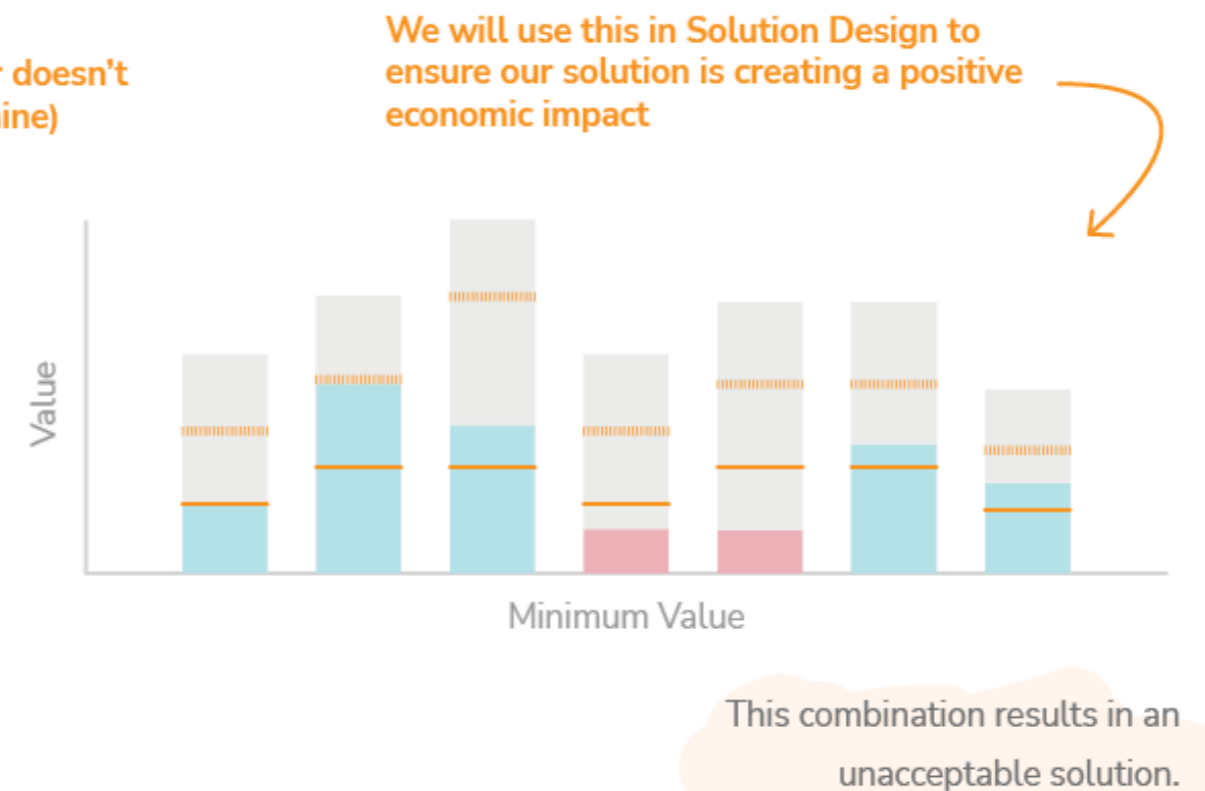
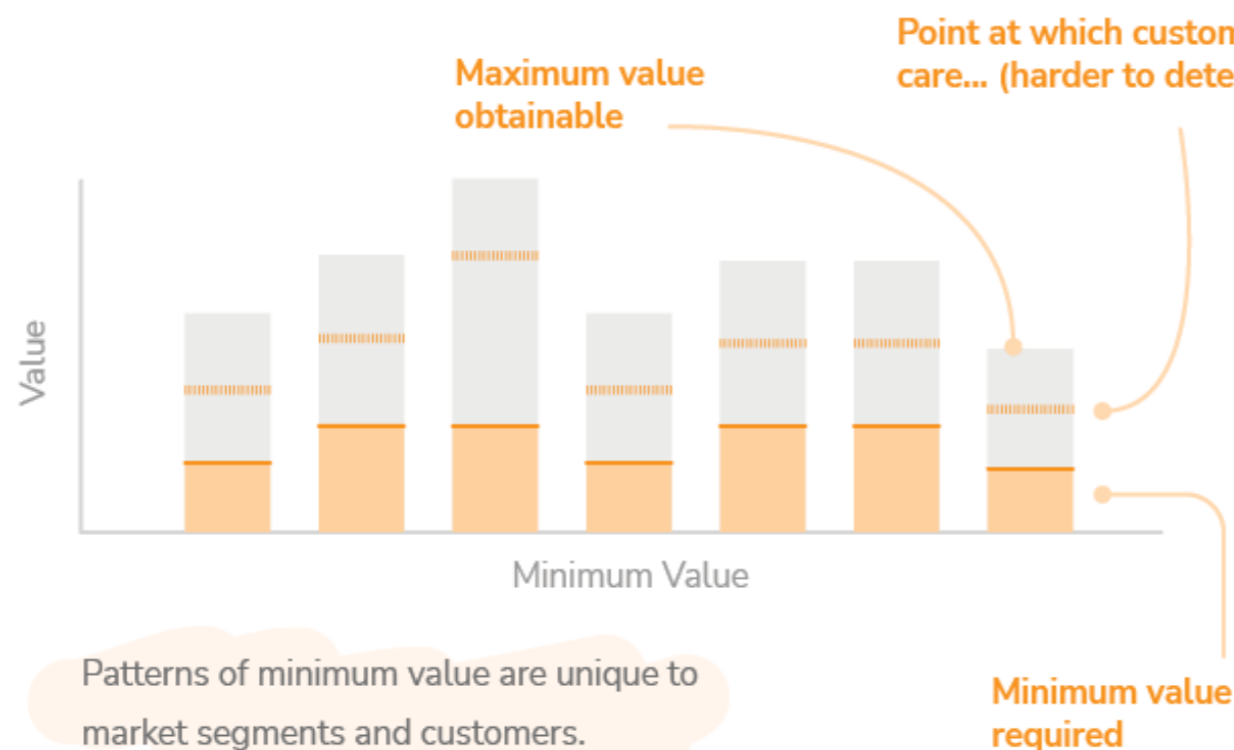
To illustrate a **Value System**, consider a solution designed to help trucking companies manage their fleet.

The desirability of a solution that reduces vehicle maintenance costs can only be assessed by understanding its effect on other dimensions of value. Most trucking company executives will drive away from a solution that decreases driver safety and satisfaction in order to reduce vehicle maintenance costs.

Trucking company executives will drive towards solutions that maximize the value of the system.



Plotting the minimum value required helps you identify when your value system may have problems.



<b>Who</b> <i>What segment is receiving the value?</i>	Sales Strategy
<b>Summary</b> <i>What value does the solution provide the customer?</i>	Time Savings
<b>Magnitude</b> <i>What is the economic impact of the value?</i> <i>How can this potential value be measured?</i> <i>How can the economic impact be expressed as a formula?</i>	Salary Cost Time Saved x Salary
<b>Implementation</b> <i>What changes does the customer need to make in order to realize the value?</i>	Medium for adopting best practices
<b>Revenue, Cost, or Risk</b>	Decrease Cost

<b>Who</b> <i>What segment is receiving the value?</i>	Sales Strategy
<b>Summary</b> <i>What value does the solution provide the customer?</i>	Increase Confidence
<b>Magnitude</b> <i>What is the economic impact of the value?</i> <i>How can this potential value be measured?</i> <i>How can the economic impact be expressed as a formula?</i>	Reduced Risk of missing numbers
<b>Implementation</b> <i>What changes does the customer need to make in order to realize the value?</i>	Medium
<b>Revenue, Cost, or Risk</b>	Risk

<b>Who</b> <i>What segment is receiving the value?</i>	Sales Leadership
<b>Summary</b> <i>What value does the solution provide the customer?</i>	Helping set the initial GTM structure correctly as a company starts to scale
<b>Magnitude</b> <i>What is the economic impact of the value?</i> <i>How can this potential value be measured?</i> <i>How can the economic impact be expressed as a formula?</i>	Territories produce more revenue and rep retention improves
<b>Implementation</b> <i>What changes does the customer need to make in order to realize the value?</i>	Moving away from manual processes and adoption of best practices
<b>Revenue, Cost, or Risk</b>	Revenue/Cost



<b>Who</b> <i>What segment is receiving the value?</i>	Sales Leadership
<b>Summary</b> <i>What value does the solution provide the customer?</i>	Increase effectiveness of the sales team
<b>Magnitude</b> <i>What is the economic impact of the value?</i> <i>How can this potential value be measured?</i> <i>How can the economic impact be expressed as a formula?</i>	Increased Revenue and more consistent rep attainment. Post Fullcast Territory Revenue / Per fullcast Territory Revenue
<b>Implementation</b> <i>What changes does the customer need to make in order to realize the value?</i>	moving from spreadsheets to the fullcast platform to carve and manage territories
<b>Revenue, Cost, or Risk</b>	Revenue

<b>Who</b> <i>What segment is receiving the value?</i>	Rev-Ops/Sales Ops
<b>Summary</b> <i>What value does the solution provide the customer?</i>	Time savings for the ops team on the annual and daily ops functions once GTM is automated through Fullcast
<b>Magnitude</b> <i>What is the economic impact of the value?</i> <i>How can this potential value be measured?</i> <i>How can the economic impact be expressed as a formula?</i>	Ops time can be spent more strategically Time savings on existing manual tasks Task Time x Salary Cost
<b>Implementation</b> <i>What changes does the customer need to make in order to realize the value?</i>	moving from spreadsheets to the fullcast platform to carve and manage territories
<b>Revenue, Cost, or Risk</b>	Cost Savings

<b>Who</b> <i>What segment is receiving the value?</i>	Sales Operations/IT
<b>Summary</b> <i>What value does the solution provide the customer?</i>	Time Savings
<b>Magnitude</b> <i>What is the economic impact of the value?</i> <i>How can this potential value be measured?</i> <i>How can the economic impact be expressed as a formula?</i>	Decreased Cost. Time spent updating execution policies when GTM changes x Salary cost
<b>Implementation</b> <i>What changes does the customer need to make in order to realize the value?</i>	Hard
<b>Revenue, Cost, or Risk</b>	Cost

<b>Who</b> <i>What segment is receiving the value?</i>	Sales Strategy
<b>Summary</b> <i>What value does the solution provide the customer?</i>	Increase Optionality
<b>Magnitude</b> <i>What is the economic impact of the value?</i> <i>How can this potential value be measured?</i> <i>How can the economic impact be expressed as a formula?</i>	Increased Revenue through exploring all potential GTM options
<b>Implementation</b> <i>What changes does the customer need to make in order to realize the value?</i>	Medium
<b>Revenue, Cost, or Risk</b>	Increase in Revenue

<b>Who</b> <i>What segment is receiving the value?</i>	FP&A
<b>Summary</b> <i>What value does the solution provide the customer?</i>	Helps finance team with sales commission compliance
<b>Magnitude</b> <i>What is the economic impact of the value?</i> <i>How can this potential value be measured?</i> <i>How can the economic impact be expressed as a formula?</i>	????
<b>Implementation</b> <i>What changes does the customer need to make in order to realize the value?</i>	Hard
<b>Revenue, Cost, or Risk</b>	Risk

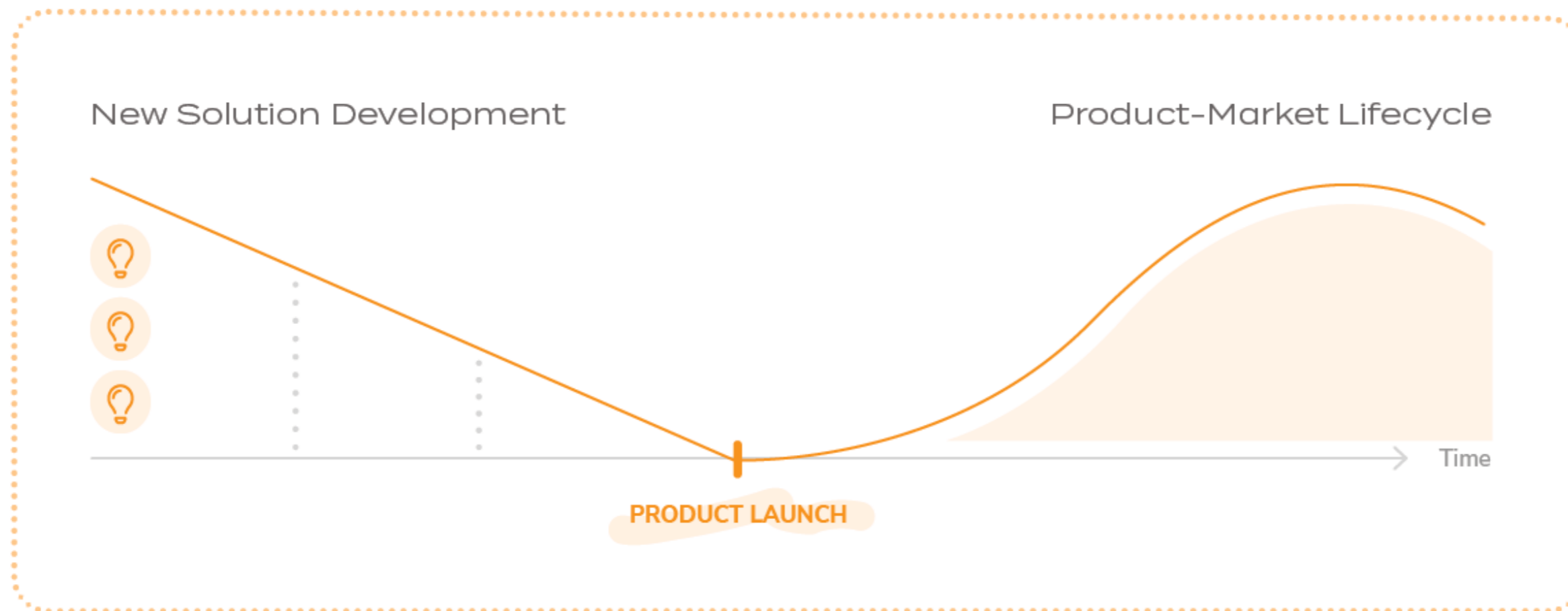
<b>Who</b> <i>What segment is receiving the value?</i>	FP&A
<b>Summary</b> <i>What value does the solution provide the customer?</i>	More accurate commission payouts through effective dating
<b>Magnitude</b> <i>What is the economic impact of the value?</i> <i>How can this potential value be measured?</i> <i>How can the economic impact be expressed as a formula?</i>	Reduction in commission overpayments.
<b>Implementation</b> <i>What changes does the customer need to make in order to realize the value?</i>	Use fullcast data from territory and rep assignments to feed commission tool
<b>Revenue, Cost, or Risk</b>	Cost Reduction

Segment	Standard		Professional		Enterprise		Add-Ons
Package	Standard		Professional		Enterprise		Add-Ons
Features and Functionality	Territories	Corporate Hierarchies	Team Design	Pre-Prod	Dedicated Business Partner (White Glove)	Audit Logs	
	US Postal Codes	Business Partner OnBoarding	Multiple GTMs	North American Postal codes	EMEA Postal Codes	Unlimited Plans	Targets
	Assignments	Reporting	Holdouts	Dedicated Business Partner	SLA	Embargo	Routing
	SmartPlan	2 Plans	5 Plans Unlimited	Acct Hierarches Automation	Industry Taxonomy	Product Design	Capacity Planning (Future)
	SFDC Integration	Sales Leadership Collaboration	Territory Workflows from within SFDC	Plan comparison modeling	Custom Fields		
		What If Scenarios					

0-6 months	6-12 months	12-18 months
<ul style="list-style-type: none"> <li>Capacity Planning</li> <li>Plan Limitation</li> </ul>	<ul style="list-style-type: none"> <li>SmartPlan v2</li> <li>Self Service Features</li> </ul>	<ul style="list-style-type: none"> <li>Notifications &amp; Approvals</li> <li>Salesforce <u>App Exchange</u></li> </ul>

New Customers	Upsell/Cross Sell	Retention	Operations
<div data-bbox="345 1017 574 1253" style="background-color: #ffffcc; padding: 5px; text-align: center;">Capacity Planning (Future)</div>		<div data-bbox="1653 1017 1882 1253" style="background-color: #ffffcc; padding: 5px; text-align: center;">SmartPlan</div>	<div data-bbox="2321 1046 2550 1282" style="background-color: #ffffcc; padding: 5px; text-align: center;">Plan Limitation</div>

**Customer Benefit Analysis** can be performed at any time.



During New Solution Development, we can use Customer Benefit Analysis to:

- ✦ Identify the most promising ideas.
- ✦ Guide development to create profitable solutions.
- ✦ Create marketing and sales materials that promote the benefits customers will receive.

After the solution is launched, Customer Benefit Analysis helps with:

- ✦ Prioritize new and/or improved features.
- ✦ Adjust pricing choices to enhance profitability and respond to competition threats.

**Book Available April 4, 2023**

**<https://profit-streams.com/>**

**<https://miro.com/miroverse/customer-benefit-analysis/>**

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