

CMO Discovery Exercise: Observer

Information provided to sales professional:

You are meeting with the Chief Marketing & BD Officer of a large firm located in the Southeast. The CMO is a long time veteran of the industry, serving in various roles at 3 major firms. However, this is the first time you have met with a marketing professional at this firm.

The firm is a big supporter. You have a personal relationship with the CIO and the manager of the risk department in Atlanta. They have gone to bat for you several times despite a couple product launches that have not gone ideally.

This firm has had Salesforce in place for 11 years. The last time you talked to the CIO, she said none of the professionals use it---ever. CRM is a dirty word, but they need to use something. They are adding new professionals all the time, and they need a way to get everyone on the same page. Based on the title of the person you are meeting with, they probably are well versed in how to build a BD program, and that might mean you have something in common with them!

Your job today is to conduct discovery via Zoom to find out what are the primary GTM strategies the firm is using for growth and how Intapp may be able to help them generate tangible results.

Information provided to CMO:

You are the Chief Marketing & Business Development Officer of a large firm located in the Southeast. You have been working in firms for most of your career, and you have worked your way up by some strategic job hopping. You report to the COO with a dotted line to the Business Development Executive Committee.

You are working on way too many initiatives since the CMO position was vacant for almost a year. You have been tasked with building a new web site, restructuring the department to focus more on BD (less on marketing communications), as well as look at relaunching the current CRM software (SalesForce).

The firm grows mainly through acquisition. Despite your requests, you are not involved in the process of screening and targeting of these acquisitions. You find out after the fact and are asked to get them up to speed on the firm, marketing, and make sure they are added to the web site. Plus no one in the firm has any idea what they actually do or what their relevant experience is. The success rate of acquisitions is hit or miss. Many leave after 3-4 years, and only about 40% of their existing clients make the transition. The Executive Committee is quite irate about this failure, and you worry it might trickle down to the COO and you feel the pressure to fix it.

One of the reasons that acquisition is so popular is that the firm has a distaste for business development. Many executives believe "if you do good work, business will come." You find this out of date and a risky strategy. You have been suggesting that a formal business development training program and coaching is needed since the firm wants to also grow by finding work from new clients. However, despite your title, you have never been a business developer. It is a title you negotiated, but you frankly do not have a great deal of experience in BD. And, you are afraid the partnership might figure that out.

You have a call today with a sales rep. They do some finance work (or something like that). You know that your CIO loves them, and are doing it as a favor to them. You are not sure if anyone has ever used them in marketing. Sounds risky, and risk is the last thing you need.

CMO Discovery Exercise #2: Sales Professional

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You are meeting with the Chief Marketing & BD Officer of a large firm located in the Southeast. The CMO is a long time veteran of the industry, serving in various roles at 3 major firms. However, this is the first time you have met with a marketing professional at this firm.

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COO Discovery Exercise #1: CMO

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