

# CLIENT SAMPLE

- Product Marketing



# Agenda

- Methodology
- Positioning
- Differentiation
- Persona
- Value Proposition
- Storytelling
- Next Steps

# Method

## 1. Collect Data

RAW MARKET RESEARCH

- Primary & Secondary
  - Business Performance
  - Product Usage
  - Product Quality

## 2. Hypothesize

RESEARCH-BASED STATEMENT THAT AIMS TO EXPLAIN AN OBSERVED TREND

- Analyze the material and group the users
- Determine value proposition and differentiator using overlapping information

## 3. Confirmation

DETERMINE IF THE PRODUCT FITS THE HYPOTHESIS OR REDEFINE PRODUCT MARKETING FIT

- Review value proposition and differentiation with stakeholders for alignment

# Positioning

This is **what Company X is** to customers.

# Who is Company X?

Contracts are currently considered a legal problem, but it's a business problem. 100% of all cash flow in and out of an organization is because of a signed contract. Sales need contracts signed to close out the quarter, HR needs contracts signed to close out roles, Finance needs contracts to understand project burn and accommodate risk in their revenue projections, and Procurement needs contracts to understand organization spending.

>>> **Contracts are how businesses talk.**

With Company X, we streamline contracts and make your business more efficient. Company X is a single-player system for end-to-end contract lifecycle management. It is the single source of truth in your organization, and with Company X, your partners become collaborators.



# Differentiators

This is **how Company X stands out** from its competitors. Spread this message far and wide in every marketing channel and distribution.



**All in one, one-stop-shop, fully integrative CLM tool,** We go far beyond just contract management. We support the entire contract lifecycle and solve business challenges that may not exist today. We're fully integrated into your existing tech stack (and your partners and vendors too).

### **Lifelong Partnerships**

With our support team, we're with you every step of the way. Need hands-on coaching? Need us to join a vendor call or partner call? Need some advice or another pair of eyes on a business problem? We're just a phone/slack/email away.

### **Trust and Transparency**

What you see is what you get. Fully transparent pricing, business model, features, and accurate reporting and insights. No add-ons, third-party consultants, or unforeseen costs.

### **Solves Business Problems**

With powerful insights, solve critical business problems such as avoiding costly mistakes, increasing efficiency, and decreasing turnaround time.

# Differentiator #1: All in one, one-stop-shop, fully integrative CLM tool

## CHALLENGE

**Traditional contract management does not work.** It's been proven. Research has shown that close to 90% of spreadsheets contain mistakes. And mistakes are costly. It can lead to critical errors such as (source link): [MarketWatch](#)

At the same time, existing CLM tools are clunky, don't have all the features you need, and have poor flexibility and integration to your existing tech stack. In other words, it doesn't work.

## VALUE

Company X is one platform that houses all your contracts and provides top-notch contract hygiene and a clean approval workflow. It is easily integrated into any system you, your stakeholders, and your company uses. No more hassles, misplaced contracts, forgotten details, or weeks-long back and forth

## EVIDENCE

- Our AI-driven solution empowers in-house legal teams to save up to 10 hours per week and helps them close deals 75% faster, freeing them to focus on more strategic projects
- Contracts processed using Company X are executed 70% more quickly than regular contracts
- Reviews from third-party sites: GetApp–4.8/5 value for money

## Differentiator #2: Lifelong Partnerships

### CHALLENGE

Software is complicated and confusing. We often purchase software, and we're on our own, and the software doesn't work the way it should or evolve with our needs.

### VALUE

Company X Experts are here 24/7 to provide consultative partnerships. We will make sure the platform grows with your business needs. Additionally, these consultants are driven to drive adoption within your organization to make your life easier.

### EVIDENCE

Suggestion: Rebrand CSM as "Experts" "Consultants" or "Counsels"

- Our implementation period is industry-leading at under 6 weeks. Customers can start using Company X from day 1
- Customer support is consistently rated a top value.

Proof:

- G2 - 9.6 rating on Company X Quality of Support
- Capterra- 5.0 on Customer Service
- Software Advice - 5 out of 5 for customer support

## Differentiator #3: Trust and Transparency

### CHALLENGE

Our competitors provide highly detailed and convoluted pricing and bundles, so you never really know what you are getting with your purchase. This leads to a bad taste in your mouth and, worse, unexpected additional costs, add on's, and inaccurate reporting or insights.

### VALUE

Company X prides itself on its commitment to trust and transparency. With us, what you see is what you get. Company X helps you and your team discover bottlenecks, become more efficient, and use actionable insights to build business cases and proposals internally. Clients have utilized Company X insights to make critical stakeholder relationships within the firm and position your team as indispensable and the single source of firm-wide truth.

### EVIDENCE

- Deep insights into overall contracting work, such as how many rounds of negotiation it takes to close one or multiple business deals and where the bottlenecks are. Our insights help demonstrate the value of your team by highlighting legal's performance across org-wide contracts, close deals 75% faster, and directly measure and improve productivity (even monitor how you fare against industry standards)
- Transparent pricing, accurate demos, honest business model.

## Differentiator #4: Solves Business Problems

### CHALLENGE

International Association for Contract & Commercial Management (IACCM) discovered that poor contract management could cost organizations up to 9% of their annual revenue. Costs are opportunity costs, penalty costs, future savings/costs, and redundancy costs. Aberdeen estimates that the collective losses are around \$153B annually.

### VALUE

- Streamlines collaboration between legal and business teams
- Templatizes standard drafts of your high-volume contracts to ensure that what is signed remains compliant with your organization's standards.
- Allows for the legal team to prioritize their work better and for the business teams to see what is being worked on.
- Generating reports becomes a cinch and can be done in minutes.

### EVIDENCE

- X% cost saved compared to manual work
- Generate agreements and get them signed X faster

# Personas

Personas are fictional characters created based on research, and they represent **segments of the market**. When a company devotes time and effort to fine-tuning its personas, it can bring many benefits to the table.

# Overview

## Buyers

**Robert** - Head of Legal

**Mike** - Chief Financial Officer

**Tom** - Head of Procurement

## Users

**Crystal** - In-house Counsel

**Ben** - Sales Representative

**Helen** - Business Operations

## Industry

SaaS, BFSI, ITES, B2B companies,  
marketplace companies

## Size

50-5000 member organization  
[Mid-Market], after Series A

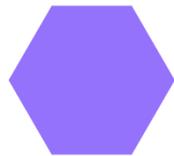
## Revenue

\$500K-10M+

**Personas**

**Buyers**

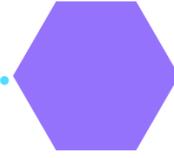
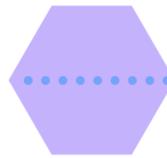
# Buying Triggers



## Personal Factors impacting decision:

- “Will this save me time and solve the problem?”
- “Is this easy to use?”
- “Will it take a long time to onboard the technology?”
- “Do I want to work with this team?”
- “Do I know anyone who has used Company X before?”
- “Will this actually work?”

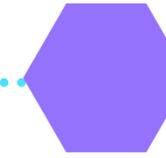
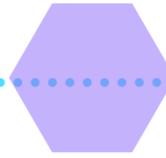
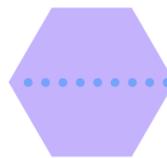
# Buying Triggers



## Financial factors impacting decision:

- “Will I need to pay more as the business grows?”
- “Will the reports provide valuable insights that help with decision-making?”
- "Is Company X within budget?"
- "Are there additional hidden costs or add-ons?"

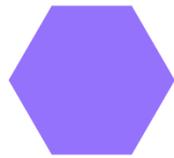
# Buying Triggers



## Operational factors impacting decision:

- “Will this streamline operations?”
- “Will this integrate with software I currently use seamlessly?”
- “Will this integrate with our clients/vendors/partner's tech stack?”

# Buying Process Scenario



- The head of legal is frustrated with their current solution for managing contracts.
- They find Company X from word of mouth, legal conferences, or direct sales outreach.
- They ask their peers about their experience working with Company X or attempt to find online reviews.
- They compare service offerings and prices to competitor sites.
- They complete the lead capture form and book a call with a sales representative for more information.
- They book a demo and meet with the team.
- They get approval from internal stakeholders (finance, compliance, procurement).

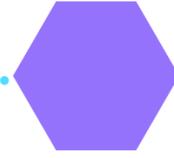
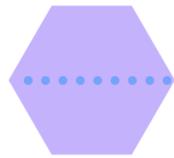
## Procurement Process

1. Problem statement (all the steps from the initial buying process)
2. Identify "must have" vs. "good to have"
3. Are the "must have" covered? To what extent are "good to have" covered?
4. Proof Of Concept (POC) - believe demos are superficial, and it's essential to get accurate POC
5. Customer references - ask questions about the vendor's post-implementation support, issues, and product enhancements.
6. Vendor Due Diligence
  - a. security/compliance
  - b. financial due diligence (how well funded is the vendor)
  - c. If it's in a non-established category like CLM, look for flexible and accommodating vendors to accommodate changes in the product roadmap and deliver enhancements on time.

## Change Management Process

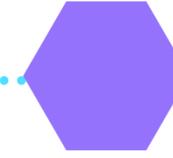
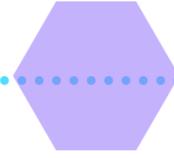
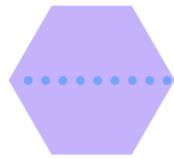
1. Understand the problem statement - the current process
2. Evaluate a vendor against multiple problem statements
  - a. Minimum of 4-5 vendors, based on demos to narrow down on 1
3. Identify the top sales leaders and get buy-in from directors and VPs
  - ID Problem
  - ID Solution
  - Ask leaders for champions as part of the evaluation
    - Represent diff audiences (e.g., regions, sales motions, complex adopters) and get them on board with the change management in the early stages
4. Involve champions in POC
5. Use champions as advocates post contract

# Decision-Making Factors



- Customer support reviews
- Features/functionality reviews
- Ease of use experienced during the demo
- Value for money
- Peer reference calls
- CFO or Procurement approval

# Why Won't They Buy



- Functionality
- Lack of brand customers or recognition
- Lack of compliance



# Robert "Bob" Smith

Job: Head of Legal & Compliance

Reports to: CFO

# of Employees: 2-3

Age: 39

## BIO

Robert is head of the corporate legal department and responsible for the legal affairs of the entire corporation, including providing legal counsel to the board of directors, chairman of the board, CEO, and senior management. He and his team are responsible for drafting, vetting, and negotiating contracts, identifying and mitigating risks, and ensuring all contracts, legal documents, and templates are up to date and compliant with statutory laws.

## ROLE IN BUYING PROCESS

Robert has one of the final say on legal technology platforms. He will review the demo based on what the product can do for his team.

## PERSONALITY

He is very busy with fiduciary duty and rarely has time due to many legal requests. His team runs lean and has strong observation skills (he can spot spelling errors or typos) and deductive solid and analytical skills. His mindset is risk avoidance and risk-averse. "How do I mitigate risk? How do I make the firm secure" Lawyers have a very tight-knit community in the US and receive information from their peers and networks. He looks for information from organizations, including TechGC, Disruptive GG, GC Women, LawTrade community, local and regional Bar Association, Legal 500, LinkedIn groups and communities, blogs such as In-House Counsel, and industry reports such as Gartner or Forrester, and websites such as Above the Law.

## COMMUNICATION PREFERENCES

Robert is involved in the research phase; he prefers knowing how the platform can help his team. Robert likes LinkedIn marketing, targeted email outreach, and 1:1 at conferences. Some messages that have resonated with Robert include:

- Do more with less.
- Mitigate risk
- Folders are not the best way to organize contracts.
- Make sales your best friend - move their deals faster.
- Be audit and due diligence ready.
- Never miss a deadline.
- Trust - our pricing is transparent, our features are as is (they are not desired state features), and our customers are at the center of what we do.

## VALIDATORS

- Backing from the CEO
- Colleague case studies
- G2 or Capterra recommendations
- Peer reviews/ referrals

## WHY WON'T THEY BUY?

- US: lack of awareness, distrust of new startups, vendor or partner or client pushback on using an "unknown" vendor
- Functionality driven: Some want capability on post integration that SD does not have yet
- Compliance driven: HIPAA requirements, SOCII

## WHAT CLOSES THE DEAL?

Value for money every time. If we can prove our product will save or make the company more than it costs, we have our foot in the door. We can close contracts faster and save time. Some areas of value:

- the CSM support
- time to value and time to onboarding 4-6wks
- functionality: purposeful features for lawyers
- integration/ in-house integration team
- peer references and live demos (it show that the existing platform is what we get, not a desired state wireframe demo)

## MOST VALUED FEATURES

- Integration with all existing tech stack
- Streamline reviews and approvals, reminders on important dates
- Insights and reporting
- Centralized repository
- Inline Editor
- Customer Success

## LEAST VALUED FEATURES

- E-Signature Tool

## MOTIVATORS

### VALUE FOR THE MONEY

Company X can help you with your metrics and goals; it helps you do more with less.

### FUNCTIONAL

Automation makes work easier for you to focus on essential tasks.

### RECOGNITION & INFLUENCE

Company X helps you look good in the boardroom. It provides you with data and insights, and you can provide concrete proof of how you and your team enable others to move faster, improve the sales pipeline, or help finance with forecasting.

## RESPONSIBILITIES

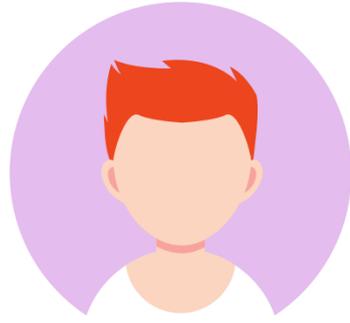
- Ensure all members of the legal team are efficient
- Provide legal advice to executives and the business
- Identify and mitigate risks
- Advice on legal implications of company policies and procedures
- Ensure all contracts, legal documents, and templates are up to date and compliant with statutory law
- Report on legal activities, risks, and litigations
- Scalability of the platform
  - Streamline the entire contracting process
- Reduce the turnaround time, reduce cost

## CHALLENGES

- Manual tasks and work overload
- Contract backlog
- Lack of visibility - without the use of centralized control, there is a lack of visibility
- Exposure to risks - with manual processes, his team faces exposure to risks such as security and compliance issues, loss of contracts
- Cost of poor contract management, such as lack of processes, difficult approval, lack of centralized location, unsearchable contracts, and poor integrations with other software
- Lack of customized access control to CLM

## GOALS

- Stakeholder management - Maintain an influential relationship with company key stakeholders and executives
- Visibility - prove the value, accuracy, and impact of the legal department to executives (they are the single source of truth)
- Hit metrics - contract turnaround time, response time, budget targets, decreasing external legal spend
- Compliance - create or amend legal contracts and general policies to include ESG compliance



# Mike Belton

Job: CFO

Reports to: CEO

# of Employees: 1-5

Age: 43

## BIO

Mike is a CFO responsible for tracking cash flow, financial planning, forecasting, and reporting. Accurate contracts and reporting are paramount, but so are ways to increase revenue or decrease costs.

## ROLE IN BUYING PROCESS

Mike has the final say on all large, recurring purchases. Mike does not do the initial research, but he must approve the expense before a transaction's made.

## PERSONALITY

Mike is hardworking, bottom-line focused, and logical. He will want to see the numbers, stats, and forecasts. He is conservative, capable, responsible, and takes his job seriously. The finance team's inputs are valued the most in the entire organization. Mike is very versed in all business operations and follows micro and macroeconomics. He wants you to quantify everything for him--what is the ROI, and how did you get there? It is difficult to get his time for a sales pitch; he does not care about the operations or how the platform works, just the ROI.

## COMMUNICATION PREFERENCES

Mike isn't involved in the research phase. Individuals or departments approach him once they have decided, ensuring feasibility. Often, colleagues don't come to him with all the detail needed; he prefers a simple one-pager packed with all the pricing, data, and recommendations he needs in one place. We should provide users with this information to forward to Mike. Messages: It's cost-effective because you are streamlining contracts; the faster contracts turnaround, the faster the revenue. It helps sales stay on top of their goals and help you plan better when you make an expenditure Reports that are available (accurate reports . SFDC is not always accurate)

## VALIDATORS

- Backing from key stakeholders
- Colleague case studies
- G2 or Capterra recommendations
- Backing from management

## WHY WON'T THEY BUY?

- Price sensitive
- Functionality: Poor integration. CFOs want easier ways to generate invoices with the accounting team. They will ask, "can you do QuickBooks? What's in it for me? How does Company X help finance?"

## WHAT CLOSES THE DEAL?

Value for money. If we can prove our product will save or make the company more than it costs, we have our foot in the door.

- ROI - identify revenue or cost saving metrics (e.g. by saving 10 hours per member, we save \$X)
- How they can plan better in terms of forecasting (see inflow/outflow) and reports

## MOST VALUED FEATURES

- Provides value by understanding the total picture of cash in/cash out on both the buy and sell-side
- Flags the correct approval to the right finance team
- Provides the most accurate reporting for investors' reports and due diligence work, and the insights and data provided can contribute to investor and series funding as well as more accurate financial forecasting

Specific Features:

- Integration with existing tools
- Data insights to help increase efficiency
- Consolidation of other tools

## LEAST VALUED FEATURES

- E-Signature Tool

## MOTIVATORS

## RESPONSIBILITIES

## CHALLENGES

## GOALS

### PRICE

### VALUE FOR MONEY

Company X can help improve efficiency, cut costs and increase revenue

- Responsible for tracking cash flow, financial planning, analyzing the firm's strengths and weaknesses, and proposing strategic directions
- Accountable to both the organization and state and federal regulations
- Liquidity - the organization's ability to pay off its short-term liabilities
- Return on Investment
- Forecasting - financial forecasting and modeling based on the company's past performance and internal and external factors
- Reporting - balance sheets and P&L and cash flow statements

- Managing cash flow - organizations need a runway, and the CFO need to manage incoming revenues and AR as well as outgoing payments and short/long-term liability
- Developing accurate financial scenarios
- Producing timely, accurate reports - reports can make or break efforts to obtain financing
- Implementing tech for finance

- Protect vital assets of the company
- Ensure compliance with financial regulations
- Close books correctly
- Communicate value and risks to investors and boards
- Increase velocity of cash flow
- Find links between operations and cash flow
- Discover ways to boost revenue



# Tom Sing

**Job:** Head of Procurement

**Reports to:** VP of Finance

**Age:** 50

## BIO

Tom is a Head of Procurement who is either brought in from the beginning of the vendor search (and has all the background context to the problem the team is trying to solve) or towards the end when the unit is ready to purchase; they can negotiate the best price. Tom is responsible for strategic sourcing and negotiating the best deal.

## ROLE IN BUYING PROCESS

Tom has one of the final say on all new vendors in the company.

## PERSONALITY

Tom is shrewd, guarded, and likes to look for information. He is reluctant to share information (e.g., the budget he is working with) and prefers taking in more details than giving it out. Tom likes to look at references (G2 or Capterra) and case studies and has his ear on the ground -- he knows from his network perceptions of vendors, NPS score, and pricing from peers. Tom tends to have his cards close to his chest and a strong bargaining advantage.

## COMMUNICATION PREFERENCES

Tom is a vital member of the buying decision. It is essential to never get on their wrong side -- when you work with procurement, you are almost at the finish line. It helps to empathize with them -- they want to get the best deals and are incentivized to save the firm money. Be ready to help them with the valuation process. "Whatever you need, I can help." Suggest and propose things to make the process easier and give helpful information. If Tom is brought in, he is negotiating on behalf of finance.

## VALIDATORS

- Trial has been tested internally
- Customer references
- Case studies

## WHY WON'T THEY BUY?

- Price sensitive (within budget)
  - Any issues, such as failed security or compliance, inadequate references, poor reputation, failed trial
- Procurement does not call the shots, but they are there to help get the best pricing. They will stop a deal if anything does not check all the boxes. They do tend to be creative with negotiation--looking for additional add-ons or asking for trial periods.

## WHAT CLOSES THE DEAL?

- Within budget
- Help them show that they will receive savings (it helps them look good internally)
- Procurement is incentivized to save money, so help them create the business case of the best deal. Do research on their behalf -- share a comparison sheet or battle card to identify the gaps between vendors, or provide case studies or reviews.

## MOST VALUED FEATURES

- Manage by side contracts in the system
- Generate reports from that (# of contracts a week closed), metrics on who on the team is responsible for vendor agreements
- Know which teams are responsible and remind them about the milestone times (proactivity).
- Be able to integrate into other procurement tools (invoicing tools)

## LEAST VALUED FEATURES

- E-Signature Tool

## MOTIVATORS

## RESPONSIBILITIES

## CHALLENGES

## GOALS

### PRICE AND PAYMENT TERMS

### VALUE FOR MONEY

### QUICK IMPLEMENTATION

Timeline (how to justify value) and if you can't show money saved directly, you can show fast implementation time (cost saving for the company)

### INTEGRATION

With tech stack (internal and external)

### RELIABILITY

### CAPACITY

ability to supply all the products required or the complete solution

### QUALITY

- Develop procurement strategies that are inventive and cost-effective
- Source and engage reliable suppliers and vendors, negotiate with them to secure advantageous terms, discover profitable suppliers and initiate partnerships
- Review existing contracts to ensure ongoing feasibility, approve PO and logistics
- Control procurement budget, oversee IT systems, provide reports
- Sourcing strategy - need to be involved with the vendor

- Supply chain challenges and disruptions
- Difficulty tracking contracts, which can also lead to poor supplier relationships
- Lack of technology
- Unorganized supplier relationship management
- Inadequate needs analysis

- Technology to lower cost
- Grow relationships with vendors
- Risk mitigation - buy goods/services at the lowest cost possible but not at the expense of stability
- Maximize purchase value, ensure optimal quality, improve procurement efficiency
- Support organization goals and objectives
- Common KPI: inventory (stock, direct charge and service spend, reagents and consumables), supplier performance (i.e. price structure, payment terms, lead time, deficiency report), buyer performance (saving by assigned category, RFQ/PR processing: actual vs. target, spend/number of PO, number of items), spend analysis
- Cheaper the better without compromising the needs/quality

**Personas**

**Users**



## Crystal Liu

**Job:** In-House Counsel

**Reports to:** Head of Legal

**Industry:** Computer Software

**Age:** 35

### BIO

Crystal is a driven in-house counsel at the center of her team's activities, and she's looking for an automated solution to handle all of the firm's contract needs. Her collaborators for the tools will include finance (who reviews and signs the contract) and the leadership team (who will also review and signs the contract). Crystal will primarily use Company X by initiating contracts and project management.

### ROLE IN BUYING PROCESS

Crystal is an influencer. She does not have the final say, but she drives the business case to get internal buy-in.

### PERSONALITY

Crystal is ambitious and driven and loves being at the center of her department. However, she can get flustered when contract needs are ramping up, and she has to stay on top of the approval process.

### COMMUNICATION PREFERENCES

When we talk to Crystal, we should emphasize Company X's ability to make her life easier. Crystal relies on external support, so we should look to provide tools (marketing assets, peer programs, price sheets, demos) to help her advocate for Company X or meet the critical decision buyer.

Key features to emphasize can include:

- Integration with all of her existing workflow and processes
- Concierge customer support team -One stop shop and her single source of truth
- Streamline reviews and approvals, reminders on important dates, inline editor, centralized repository
- Customer Success

## MOTIVATORS

## RESPONSIBILITIES

## CHALLENGES

## GOALS

### **AUTOMATION**

of any activities that can be automated, including menial paperwork so that they can focus on more critical tasks

### **USER-FRIENDLY**

Easy integration of all current software and platforms, one button to sync across all platforms

### **VISIBILITY**

able to see and follow all contract updates and status

### **HASSLE-FREE**

day-to-day activities

- Create, draft, and coordinate contract transactions
- Research, analyze, and monitor the status of assigned cases
- Write legal memoranda and prepares the legal document for review and approval
- Create employee contracts and benefits briefs
- Draft shareholder agreements and documents related to trademarks, brands, and patents
- Prepare financial reports

- Lack of standardization and centralization of contracts
- Contracts can be in Google Drive or Word, and contract signature management from DocuSign or AdobeSign
- Disorganize management of documents
- Traditional spreadsheet method has errors
- Easy to miss important information
- Back and forth with other departments and clients

- Reduce turnaround time of contracts
- Get work done as quickly and smoothly as possible
- Do well at work and get recognition or promotion, and to do this by doing well at the goals management set



## Ben Ryan

**Job:** Sales Representative

**Reports to:** Chief Revenue Officer

**Industry:** Computer Software

**Age:** 32

### BIO

Ben is outgoing, fun, and extroverted and loves talking, networking, and presenting. He wants to exceed his quarter's quota and earn that large commission. He will mainly use Company X for customer deals. His collaborators include the legal team and the prospects' legal team.

### ROLE IN BUYING PROCESS

Ben does not influence the decision to purchase but is a heavy user and contract initiator.

### PERSONALITY

Ben is active on all social media, including LinkedIn and Twitter. He is comfortable with cold calls (it's what he does as well!). He relies on his peers for information.

### COMMUNICATION PREFERENCES

We usually may not talk to Ben as much in the buying process. However, Ben could be a potential "in" to a new company and a key obstacle in product adoption. When we speak to Ben, we should emphasize that Company X is proven to turn around contracts faster than manual processes and that a more rapid turnaround can equal quicker wins, thus affecting their quota and commission.

Key areas to emphasize:

- increase revenue by executing contracts X% faster
- generate and sign agreements X quicker
- reduce sales cycle
- contract in one place, easily streamlined

## MOTIVATORS

## RESPONSIBILITIES

## CHALLENGES

## GOALS

### **FAST CONTRACT TURNAROUND**

the shorter the TAT the quicker you can close that deal and hit your quota

### **HASSLE-FREE**

contract management system- automate your process, streamline approval, and increase contract efficiency

### **QUICK AND EASY INTEGRATION**

once you set it up, you can forget about it.

### **VISIBILITY**

able to have a quick overview of all contracts and records

- Generating leads
- Meeting/exceeding sales goals
- Negotiating all contracts with prospective clients
- Preparing and submitting sales contracts for orders
- Helping determine pricing schedules for quotes, promotions, and negotiations

- Difficulty following up with their legal team
- Lack of visibility with the contract
- Closing Deals
- Engaging multiple decision-makers at a company
- CRM systems
- Lead management
- Overcoming price objections

- Fast contract turnaround time and faster-closed deals - generate revenue and hit quota
- Increase number of leads qualified, win rates, customer lifetime value
- Reduce customer acquisition costs and customer churn
- Increase units sold and boost profit margins



# Helen DeLeon

**Job:** HR Manager

**Reports to:** Head of Human Resources

**Industry:** Computer Software

**Age:** 45

## BIO

Helen is a friendly, warm, and engaging HR representative. She has solid organizational and communication skills and enjoys managing conflicts. She will initiate many contracts for her company's employees, including RSU grants, Options, and new hires and onboarding. She may also be involved in vendor contracts and healthcare benefits.

## ROLE IN BUYING PROCESS

Helen is an influencer. She does not have the final say, but she drives the business case to get internal buy-in.

## PERSONALITY

Helen is friendly, warm, efficient, and a great communicator. She loves her employees, but all the different contracts can confuse her.

## COMMUNICATION PREFERENCES

Helen is active on social media but prefers to be contacted via email. She doesn't like cold calls. When researching a topic or solution, she relies on industry publications or peer reviews, such as articles or guides. Existing customers prefer individual outreach from the Company X team for upselling or cross-selling opportunities through email or Slack.

## GOALS FOR COMPANY X

When we talk to Helen, we should emphasize our product's ability to make her life easier.

Key features to emphasize can include:

- integration with all of her existing workflow and processes
- user friendly
- help all of her contracts become easy to manage
- concierge customer support team
- one-stop-shop and her single source of truth

## MOTIVATORS

## RESPONSIBILITIES

## CHALLENGES

## GOALS

### **AUTOMATION**

of any activities that can be automated, including menial paperwork so they can turn to more important tasks

### **USER FRIENDLY**

easy integration of all current softwares and platforms, one button to sync across all platforms

### **VISIBILITY**

able to see and follow all contract updates and status

### **HASSLE-FREE**

day to day activities

- hiring and interviewing staff
- administering payment, benefits and leave
- enforcing company policies and practices
- process payroll
- maintain employee records
- secure vendors

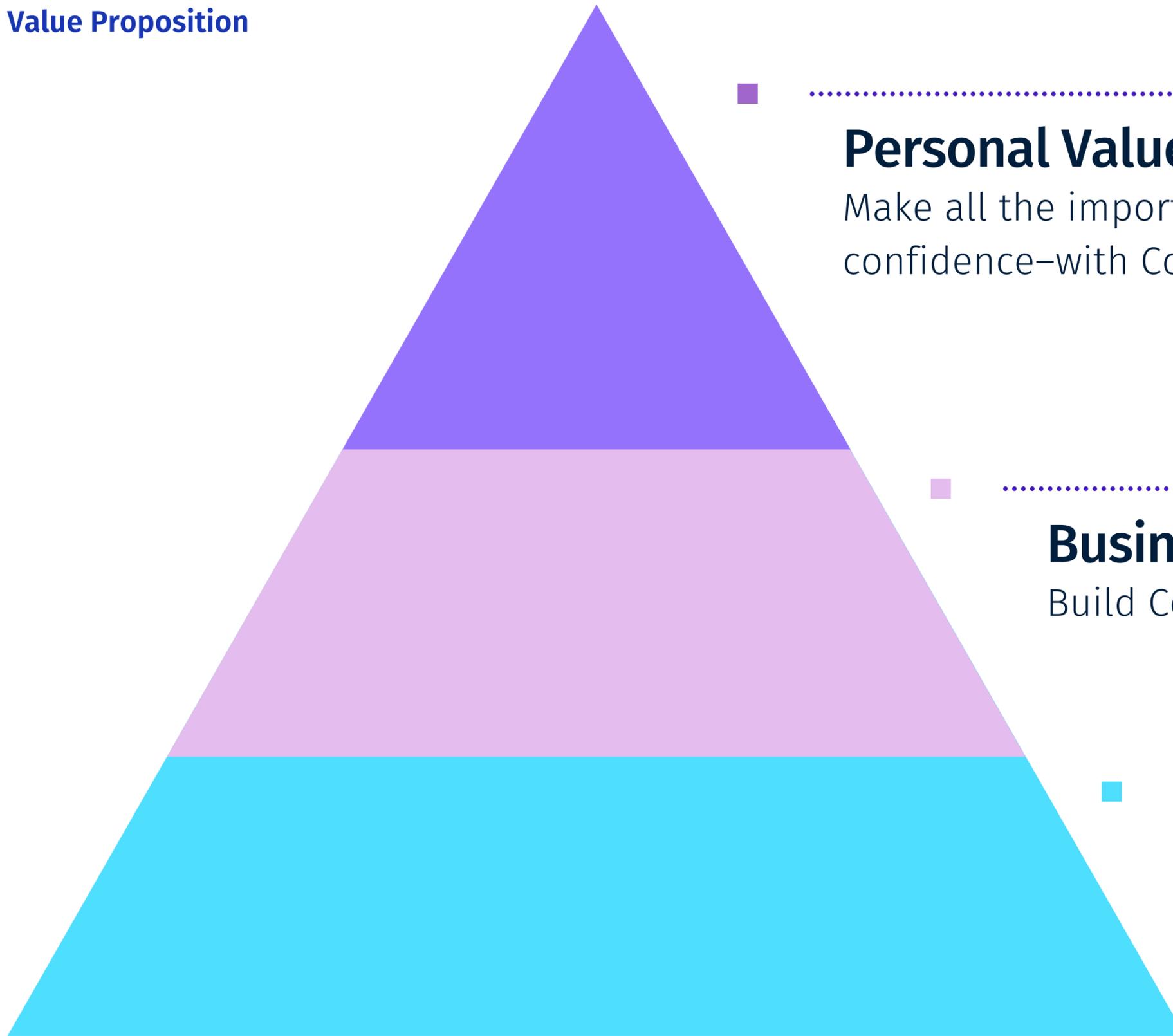
- Difficulty following up with their legal team
- Lack of visibility with the contract
- Attracting talent
- Diversity in the workplace
- Managing relationships

- Excel in organizational excellence
- Increase staff retention
- Enhance company culture
- Benefits and compensation
- Ensuring company is in compliance with all laws and regulations
- Recruiting and staffing

# Value Proposition

This is your marketing **North Star**.  
Try to match the messaging to the  
Value Proposition for all marketing  
initiatives. Provide targeted  
messaging per persona.

## Value Proposition



### Personal Value

Make all the important decisions with confidence—with Company X at your side

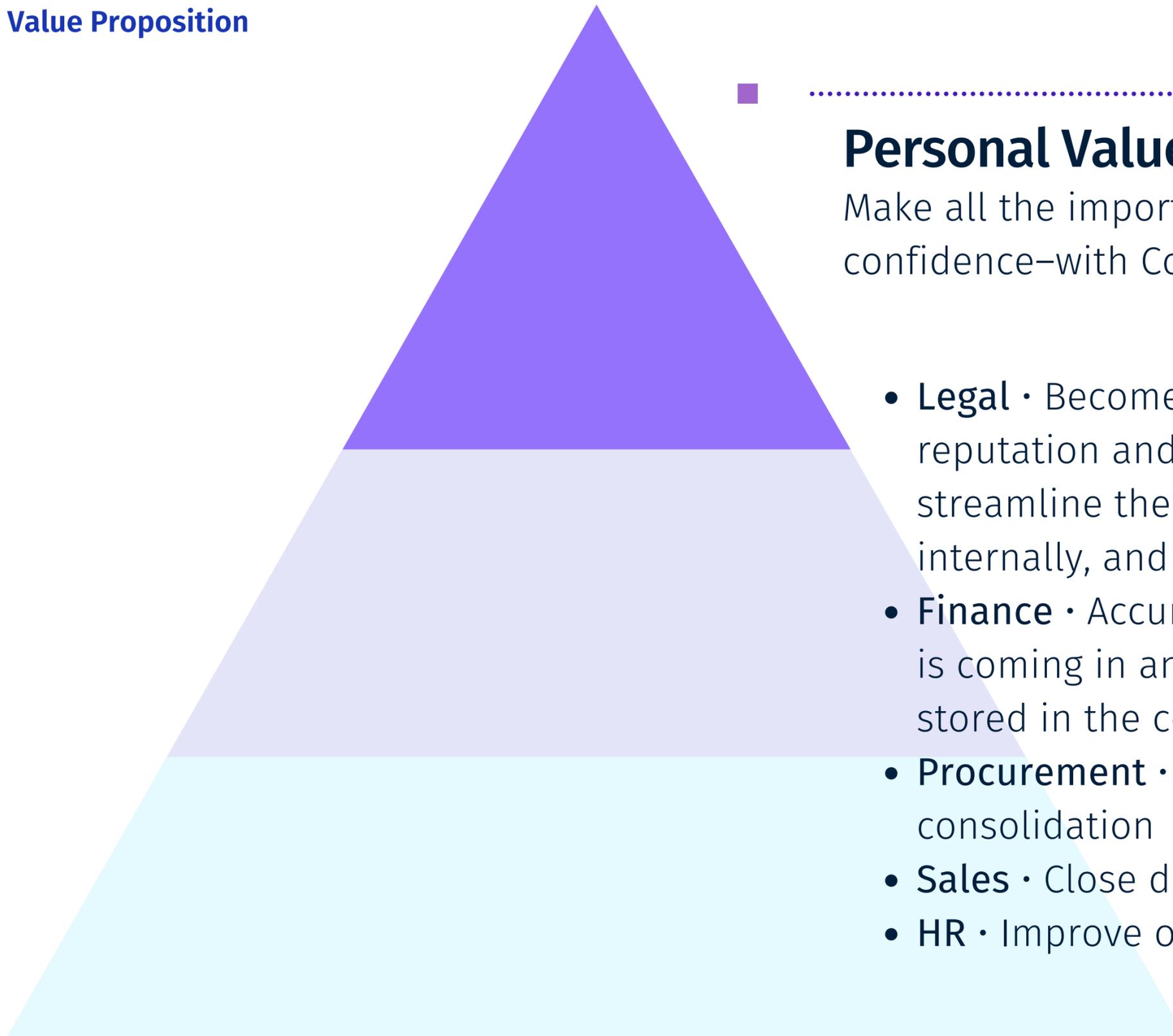
### Business Value

Build Contracts. Drive Business.

### Feature Value

Reduce costs and save time with Company X's central repository, in-real-life analytics, and self-service capabilities.

## Value Proposition

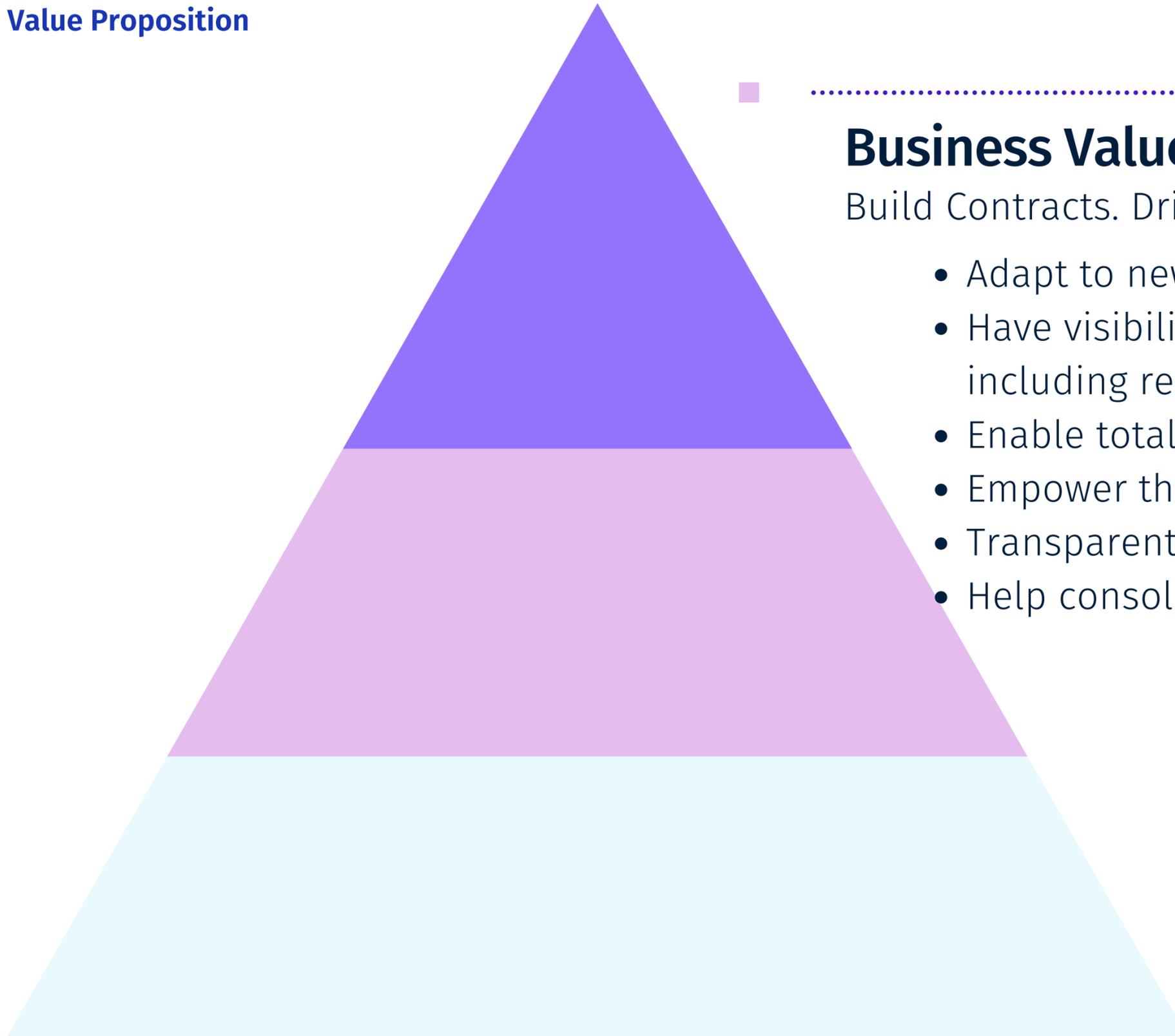


### Personal Value

Make all the important decisions with confidence—with Company X at your side

- **Legal** • Become a business enabler, build a credible reputation and strong rapport with business colleagues and streamline the contracting process and escalation process internally, and be able to resolve the issue efficiently
- **Finance** • Accurately project the firm's cash flow better (what is coming in and out in terms of revenues and expenses stored in the contracts)
- **Procurement** • Decrease costs and provide vendor consolidation
- **Sales** • Close deals faster and hit quarterly quota
- **HR** • Improve onboarding experience

## Value Proposition

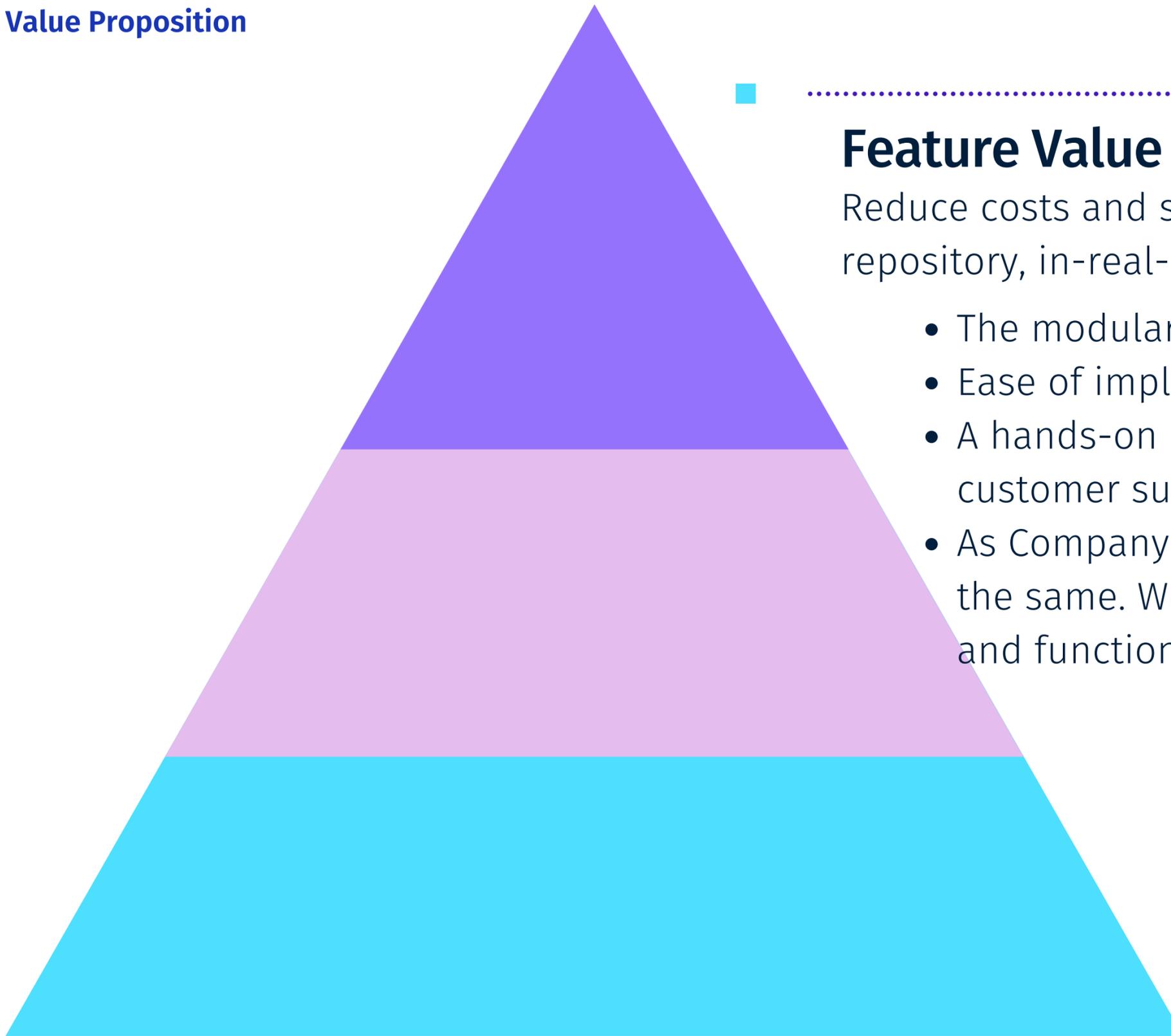


## Business Value

Build Contracts. Drive Business

- Adapt to new business needs (we grow as you grow)
- Have visibility of the entire CLM management, including reports and analytics
- Enable total access to contracts
- Empower the entire company with self-service options
- Transparent pricing, features, and implementation
- Help consolidate multiple vendors and cut costs

## Value Proposition



### Feature Value

Reduce costs and save time with Company X's central repository, in-real-life analytics, and self-service capabilities.

- The modularity of the product
- Ease of implementation
- A hands-on partnership including coaching and premium customer support
- As Company X grows, the features you care about will stay the same. We will never compromise profit with our service and functionalities.

# Template

## **FOR**

Lorem ipsum dolor sit amet

## **WHO**

Lorem ipsum dolor sit amet, consectetur adipiscing elit

## **WE PROVIDE**

the Single Source of Contract Lifecycle Truth

## **THAT**

has everything you need in one single fully integrated platform - from instant creation of contracts to automatic workflow, powerful data insights, and intelligent contract management

## **UNLIKE**

IronClad

## **WHO**

is expensive, lacks support, and charges additional fees for services that should be part of the initial pricing (such as third-party implementation, integrations, and support)

## **OUR COMPANY**

offers an all-in-one, fully integrated CLM platform, trust and transparency, and lifelong partnerships

## **TO HELP YOU**

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua

# Buyer

HEAD OF LEGAL & COMPLIANCE

## **FOR**

Head of Legal and Compliance

## **WHO**

wants to improve efficiency (and team and personal reputation and influence), prevent compliance issues, increase TAT and decrease loss

## **WE PROVIDE**

the Single Source of Contract Lifecycle Truth

## **THAT**

has everything you need in one single fully integrated platform - from instant creation of contracts to automatic workflow, powerful data insights, and intelligent contract management

## **UNLIKE**

IronClad

## **WHO**

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## **OUR COMPANY**

offers an all-in-one fully integrated CLM platform, trust and transparency, and lifelong partnerships

## **TO HELP YOU**

obtain powerful insights into the entire contracting process and justify the value your team brings in. To be perceived as a business enabler and build partnerships with company-wide stakeholders.

# Buyer

CHIEF FINANCIAL OFFICER

## **FOR**

Chief Financial Officer

## **WHO**

wants to accurately forecast and project cash flow, decrease costs and consolidate vendors

## **WE PROVIDE**

the Single Source of Contract Lifecycle Truth

## **THAT**

has everything you need in one single fully integrated platform - from instant creation of contracts to automatic workflow, powerful data insights, and intelligent contract management

## **UNLIKE**

IronClad

## **WHO**

is expensive, lacks support, and charges additional fees for services that should be part of the initial pricing (such as third-party implementation, integrations, and support)

## **OUR COMPANY**

offers an all-in-one fully integrated CLM platform, trust and transparency, and lifelong partnerships

## **TO HELP YOU**

project the firm's cash flow better (what is coming in and out in terms of revenues and expenses stored in the contracts) and help close more deals in a quarter. Company X has been shown to execute contracts X% faster, generate/sign agreements X faster, and save X% of the cost compared to manual work.

# Buyer

HEAD OF PROCUREMENT

## **FOR**

Head of Procurement

## **WHO**

wants to oversee spend management and use procurement to support business goals

## **WE PROVIDE**

the Single Source of Contract Lifecycle Truth

## **THAT**

has everything you need in one single fully integrated platform - from instant creation of contracts to automatic workflow, powerful data insights, and intelligent contract management

## **UNLIKE**

IronClad

## **WHO**

is expensive, lacks support, and charges additional fees for services that should be part of the initial pricing (such as third-party implementation, integrations, and support)

## **OUR COMPANY**

offers an all-in-one fully integrated CLM platform, trust and transparency, and lifelong partnerships

## **TO HELP YOU**

leverage technology to reduce costs and waste, develop a clear overview of your company's spend, and build stronger vendor relationships. Company X has saved X% of the cost and X hours per week per team member compared to manual work.

# User

IN-HOUSE LEGAL TEAM

## **FOR**

In-house legal team

## **WHO**

wants a centralized end-to-end contract lifecycle management tool that will help them prevent disasters and make the process hassle-free and easy, allowing them to focus on other tasks instead of repeating the same work repeatedly.

## **WE PROVIDE**

the Single Source of Contract Lifecycle Truth

## **THAT**

has everything you need in one single fully integrated platform - from instant creation of contracts to automatic workflow, powerful data insights, and intelligent contract management

## **UNLIKE**

IronClad

## **WHO**

is expensive, lacks support, and charges additional fees for services that should be part of the initial pricing (such as third-party implementation, integrations, and support)

## **OUR COMPANY**

offers an all-in-one, fully integrated CLM platform, trust and transparency, and lifelong partnerships

## **TO HELP YOU**

automate the mundane paperwork and focus on the things that matter. Company X has been shown to save each team member X hours per week.

# User

SALES REPRESENTATIVES

## **FOR**

Sales Representatives

## **WHO**

wants to increase revenue by speeding up contracts and agreements.

## **WE PROVIDE**

the Single Source of Contract Lifecycle Truth

## **THAT**

has everything you need in one single fully integrated platform - from instant creation of contracts to automatic workflow, powerful data insights, and intelligent contract management

## **UNLIKE**

IronClad

## **WHO**

is expensive, lacks support, and charges additional fees for services that should be part of the initial pricing (such as third-party implementation, integrations, and support)

## **OUR COMPANY**

offers an all-in-one, fully integrated CLM platform, trust and transparency, and lifelong partnerships

## **TO HELP YOU**

reduce the long sales cycle, create and send out contracts without involving legal, enhance collaboration with the legal team, and get insights on contract bottlenecks. Company X has been shown to execute contracts X% faster and generate and sign agreements X faster than manual processes.

# User

HUMAN RESOURCES

## **FOR**

Human Resources Manager

## **WHO**

wants to hire and onboard new employees

## **WE PROVIDE**

the Single Source of Contract Lifecycle Truth

## **THAT**

has everything you need in one single fully integrated platform - from instant creation of contracts to automatic workflow, powerful data insights, and intelligent contract management

## **UNLIKE**

IronClad

## **WHO**

is expensive, lacks support, and charges additional fees for services that should be part of the initial pricing (such as third-party implementation, integrations, and support)

## **OUR COMPANY**

offers an all-in-one fully integrated CLM platform, trust and transparency, and lifelong partnerships

## **TO HELP YOU**

get fast onboarding processes, which include creating and sending out employment contracts.

# Storytelling

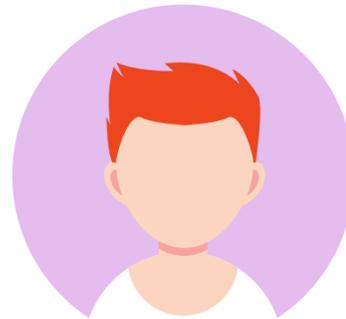
This is **YOUR story**. Use this as a basis for all content marketing initiatives.

# Choose your adventure



## **BOB- HEAD OF LEGAL**

Currently, he is highly concerned about contract inefficiency due to traditional manual contract management....



## **MIKE-HEAD OF FINANCE**

He is very concerned about his firm's cash-in and cash-out details...



## **TOM - HEAD OF PROCUREMENT**

He is very concerned with the contract management system. Currently, there isn't a transparent contract management system, and he is having difficulty tracking contracts, leading to poor supplier relationships...

# Choose your adventure



## **CRYSTAL - IN HOUSE COUNSEL**

She is drowning in hundreds of contracts with clients, employees, and vendors. All of her contracts are in different stages, requiring nuanced reviews...



## **BEN - SALES REP**

He is knee-deep in the sales pipeline, including prospects, potential prospects, and open opportunities. He's a great sales rep, so he has quite a few large contracts in progress with legal and some with the clients...



## **HELEN - HUMAN RESOURCES**

Helen's head is swimming with all the contracts she has--she's onboarding 20 new hires, exploring contracts with old dental and insurance policies, and in the middle of new agreements with a new vision policyholder...

A large, dark blue arrow pointing from the left side of the slide towards the right. The arrow is filled with a solid dark blue color and has a white outline. The text "Next Steps" is written in white, bold, sans-serif font inside the arrow.

**Next Steps**

# Information Utilization

## Marketing Strategy

Devise marketing campaigns and messaging around the persona. Create highly segmented, targeted content marketing. Specific marketing content and assets, including (but not limited to)

- Marketing-Led Lead Scoring
- Revised Demo Experience based on Client Type
- YouTube with Case Studies + Knowledge Base
- Implement Event-Focused Demand Gen Strategy

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## \*Customer Marketing

Launch a customer marketing program, including

- Customer advisory board
- Peer references
- Case Studies
- Third-party reviews (G2, GPI, Capterra)
- Referrals
- Quotes library