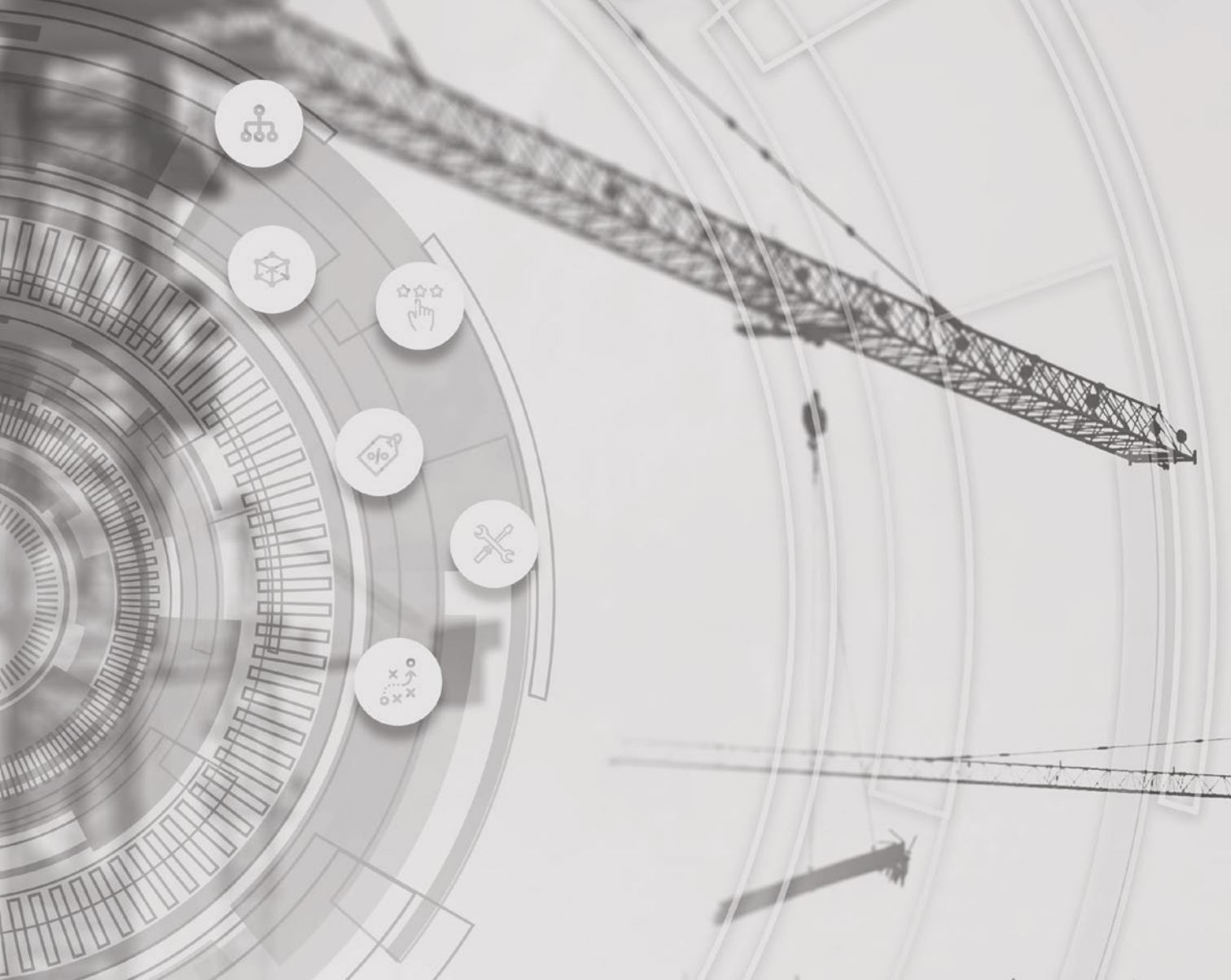




Transformations in B2B Go-to-market Design:

Connecting strategy to execution



Integration

Together, for the change you need

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Executive Summary

The difficulty of connecting strategy to execution is a top concern among the more than 500 CEOs we work with each year. A go-to-market transformation in any context has the power to resolve this challenge across many aspects of a business, and the B2B Go-to-market in particular holds dynamic possibilities.

The focus of this report is to explore Integration's comprehensive approach to B2B Go-to-market design through a three-part toolbox, followed by a discussion of our proprietary B2B Cluster Framework. Based on our cross-functional industry expertise, the B2B Cluster Framework is a self-assessment tool that distills key drivers of

business demands across more than 50 sectors and industries. By answering three simple questions about your business, it's possible to position it in one of six clusters and deep-dive into the challenges, tools and priority actions that are most important to the B2B Go-to-market in your specific context.

First, however, we recommend grasping the full potential of a B2B Go-to-market that accounts for the background of your company and movement in the market, without copying models of the past. Deeply rooting strategy in the current reality of a company is inherent to Integration's way of working, and fundamental to how we approach go-to-market transformations.

i. The Strategy-to-Execution Toolbox

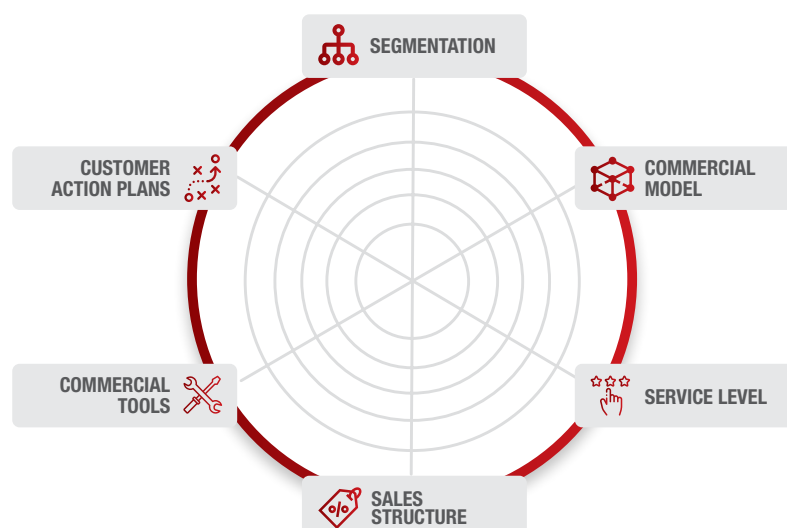
A three-part toolbox, beginning with the first step of the B2B Go-to-market: establishing your company's **market foundation**. This requires a deep analysis that covers:

a. Voice of market: a diverse, objective, end-to-end view of the client ecosystem. What are clients saying about your product or service across all regions and channels?

b. Demand distribution index: a detailed analysis of demand by region to understand the size of specific opportunities..

c. Cost-to-serve: the well-known exercise, executed effectively through exacting detail per client and by aggregating results per channel.

Part two of our toolbox is **B2B Go-to-market Design**, which gives an overview of the six fundamental tools we use to ensure a new commercial approach considers all opportunities. Understanding these tools sets the stage for prioritization in chapter two. The six tools are:



In part three of the Strategy-to-Execution Toolbox, **change management and implementation** are viewed through the lens of the CEO and actions for top leadership. Importantly, change management is not the “third” or “last” piece of the go-

to-market puzzle, but half of what it takes to ensure a commercial strategy is fully implemented. Without this attention to people from the very beginning of a project, we don’t believe technical efforts — no matter how robust or expert — will be successful.

i. The B2B Cluster Framework

The second chapter of the report is the **B2B Cluster Framework**, which begins with asking businesses to consider a set of criteria that defines the demands they must fulfill in the market.

CLUSTER CRITERIA:

I. SECTOR DYNAMICS	Does your industry serve a single sector or several?
II. PRODUCT / SERVICE DYNAMICS	Is my product /service essential to my clients' businesses or complementary?
III. INNOVATION DYNAMICS	Is innovation a means of differentiation in my sector or a matter of survival?

Answering these questions results in a plotted position within the B2B Cluster Framework in one of six clusters that corresponds to specific challenges, priority tools and actions. A detailed look at each cluster follows the self-assessment exercise, featuring examples of industries and sectors that

share similar demands, and practical ideas for how to win with your clients.

We encourage you to deep-dive into the topics above through the full report, or access specific sections and downloadable takeaways on our website.

I. The B2B Go-to-market as a all-company journey

In our work with more than 500 CEOs each year, we find the challenge of connecting goals to concrete actions universally challenging. Across industries, products, services, regions and company sizes, executives continually speak to us about the hardship of translating business aspirations into practical steps.

This includes the sizable effort it takes to develop a new

commercial strategy. However, unlike other business solutions, an effective go-to-market (GTM) stands out for its ability to resolve several of the key concerns of CEOs at once – including the critical priority of linking strategy to execution.

The potential of the GTM to connect strategy to execution exists across many scenarios, but the B2B landscape represents

THE TOP CONCERNS AMONG CEOs



Grow while maintaining
profit

Lack of connection between
strategy and execution

Difficulty
implementing innovation

Lack of
field perspective

Wasting time
internally

Wrong Timing to
market

Process lost in
prioritization

In our work with approximately 500 CEOs each year, we hear a variety of concerns – connecting strategy to execution is among the most common, and can be resolved through an effective GTM.

dynamic possibilities — how a company reaches its clients is only the beginning. A strong B2B GTM will consider multiple demands depending on the type of service or product it offers, including why customers should choose the business as a partner, how to incentivize long-term relationships, the scope of after-sales services, opportunities for innovation and more.

In our experience, a majority of businesses overlook — and underutilize — rich possibilities. For example, we see companies gather limited information on customer perceptions, fail to assess the size of individual opportunities and skip detailed financial analyses.

The B2B GTM journey is also often thought of as exclusive to the sales area, but we believe capturing its full value requires much wider perspective and buy-in. For instance, if product improvements can attain higher market share, research and development, legal and production will be valuable inputs — or if you plan to pursue new sectors, there may be impacts to logistics and supply chain.

Buy-in is critical in managing how employees respond to news of the new commercial strategy as well. Anxiety tends to spread quickly throughout organizations, especially when professionals remain in the dark about changes to the status quo. Unmanaged fear can become active resistance, creating risk to implementation and success in the long run.

For this reason, the first and most important alignment of the B2B GTM should be positioning who will be included in its development and the role they will play. In our view, this is a cross-organizational transformation that must be driven from the C-suite. This is rooted in our belief that for any transformation to be successful, it must strike a careful balance between the “technical” — data, analysis, design, planning etc. — and the human — attention to the people who will bring it to life. By leveraging the power of the CEO to spearhead the B2B GTM, the impact of the commercial strategy will not only be more relevant and powerful organization-wide, but deeply responsive to the needs of the business.

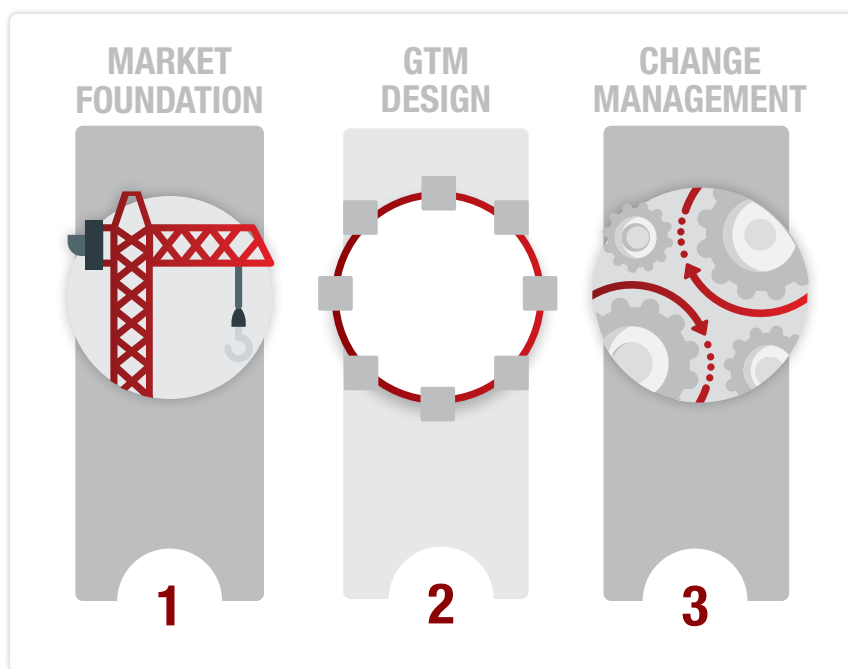
To show how our approach works pragmatically, we share our comprehensive Strategy-to-Execution Toolbox, a hands-on guide that combines technical strategies with best practices in change management and implementation. In addition to supporting the design of a customized B2B GTM, the toolbox continuously links ideas to actions by placing emphasis on adhering to your reality — rather than relying on old paradigms that may no longer match the current needs of the business.



II. The Strategy-to-Execution Toolbox

The foundation of our approach to B2B GTMs is the Strategy-to-Execution Toolbox — a comprehensive, three-part guide to tailored commercial strategy design. Although the toolbox represents a proven path, the solutions that result and what implementation looks like in each

context are entirely unique. The toolbox includes the key ingredients of Market Foundation, GTM Design, change management and implementation. However, change management is not the “third element” — it cuts across all components. It is both the crux of the transformation and the other half of the solution.



The Strategy-to-Execution Toolbox (fig. 1)

i. Market Foundation

All GTMs begin with defining their objectives, which should be aligned with the strategic goals of the company. Some B2B GTMs are intended to hit several targets at once, but will likely be focused on increasing profitability or capturing higher market volume or share.

Once these objectives are defined, the first step is to establish the Market Foundation your company is operating within. Fundamentally, this stage entails robust information-gathering and detailed analysis — and it is a critical moment to understand the reality of your company, from the outside-in.

It sounds simple, but many businesses start off by recycling a tried-and-tested B2B GTM designs that cloud and limit possibilities from the outset. The two most common paradigms involve taking a past B2B GTM model and modifying it (“the taboo”), or replicating the strategies of competitors to emulate their results (“the copy and paste”). In theory, these approaches seem reasonable and may lead to some good ideas — but they inherently entail adapting something that’s already been done to fit your current circumstances.

A woman with long dark hair, wearing a light-colored blazer over a white shirt, is shown from the waist up. She is looking slightly to her right and gesturing with her hands as if in the middle of a presentation or conversation. The background is a soft, out-of-focus grey.

In addition to reducing the likelihood of an effective implementation, these tactics don't facilitate the right strategies because they don't respond to the demands of your business now. For instance, where your product or service is sold, what your clients do with your product or service, the role it plays in their businesses, whether or not you are meeting expectations in quality, service, pricing and more. Simply put, it doesn't matter whether you choose the taboo or the copy and paste, both fail to define the demands your business must fulfill from the perspective of the market – from the outside-in.

While awareness of competitor movement and what's been done at the company in the past are sound practices, the key is to not rely on them too heavily, especially to the extent of little other exploration or research. This has high potential for misfire in identifying ways to differentiate the value of your business for your clients. To achieve this understanding, three core actions are needed to establish your Market Foundation:

a. Voice of the market: a diverse, objective, end-to-end view of the client ecosystem, typically gathered through a questionnaire and/or interviews. A sample that covers all regions and channels is the goal here – satisfied vs. dissatisfied customers; those who value price over service and vice versa, distributors vs. wholesalers vs. resellers etc. The output should be a clear picture of what matters to each customer type so that solutions can be developed that meet their needs while ensuring the efficiency and efficacy of your internal operations.

One example of how the voice of the market benefits the B2B GTM can be illustrated through the case of a paper and derivatives manufacturer that used interviews to divide their clients into two groups. The first included clients for whom office materials were essential. They placed orders frequently and required the company's products for everyday operations. For these clients, service and a one-stop shop for goods were more critical than cost.

By comparison, the second group comprised clients who purchased paper in bulk and maintained high inventory levels, making price more critical than service. Consequently, the B2B GTM included two commercial model designs that ensured both needs were met while netting a cost reduction for the manufacturer: one incorporated a distributor with a solid service reputation and product offerings to complement the clients' needs, while the other secured the most cost-effective delivery method possible.

b. Demand distribution index: an overview of demand by region to gain detailed knowledge of the size of different opportunities by location. This index should be matched to

choices about how (or whether) to specialize the commercial model. Likewise, it can indicate where too much effort is being expended on a small opportunity vs. where untapped profit has yet to be captured.

As one possibility, the demand distribution index added depth and detail for the paper and derivatives manufacturer described above, solidifying the decision to segment commercial models per client type. However, specializing approaches may not be viable if the regions you serve don't represent the critical mass and profit needed to justify higher costs.

Take the case of a professional services company with a fleet of salespeople. The company was aware that specialized salespeople were more effective in selling products to specific client segments than those with general knowledge. But, this was difficult to maintain across multiple regions. Using the demand distribution index exercise, the company identified that 10 regions represented 40 percent of their revenue, and there were strong business incentives for building a more technical, specialized sales force in these areas. In contrast, in the other geographies the company served, a hybrid model that guaranteed broad coverage (with some specialization where warranted) proved to be a strong solution.

c. Cost-to-serve: this is a well-known exercise, but in our experience, it usually isn't done effectively — either per client, or by aggregating results per channel. Similarly, the criteria behind the cost allocation may mask the profitability of some clients, leading to decisions that affect the B2B company's bottom line. Factors

to consider include client-based research and development, selling services, customer service and more.

An exacting picture of profit and loss per client makes comparisons between and among industries possible. In turn, this enables adjustments, new service-level definitions and the possibility of cutting clients if needed. A key benefit of cost-to-serve analyses is the ability to break free of a one-size-fits-all service model — service levels may be of more or less importance to your business, but are of significant value to discussions focused on profitability.

Returning again to the case of the paper and derivatives manufacturer, after determining the value of service vs. price for each client type, the cost-to-serve exercise was used to select the commercial model for the group focused on price (those who bought in bulk).

Another, more complex example involves a chemical company with a mix of regional and overseas clients. Due to the fluctuation of currency rates, at times the in-country clients were more profitable, but at other times, the export-related clients were more profitable than a subset of the in-country group. This understanding was facilitated by a rigorous cost-to-serve analysis that was performed by channel, giving the company new visibility into logistics and customs costs, among other factors.

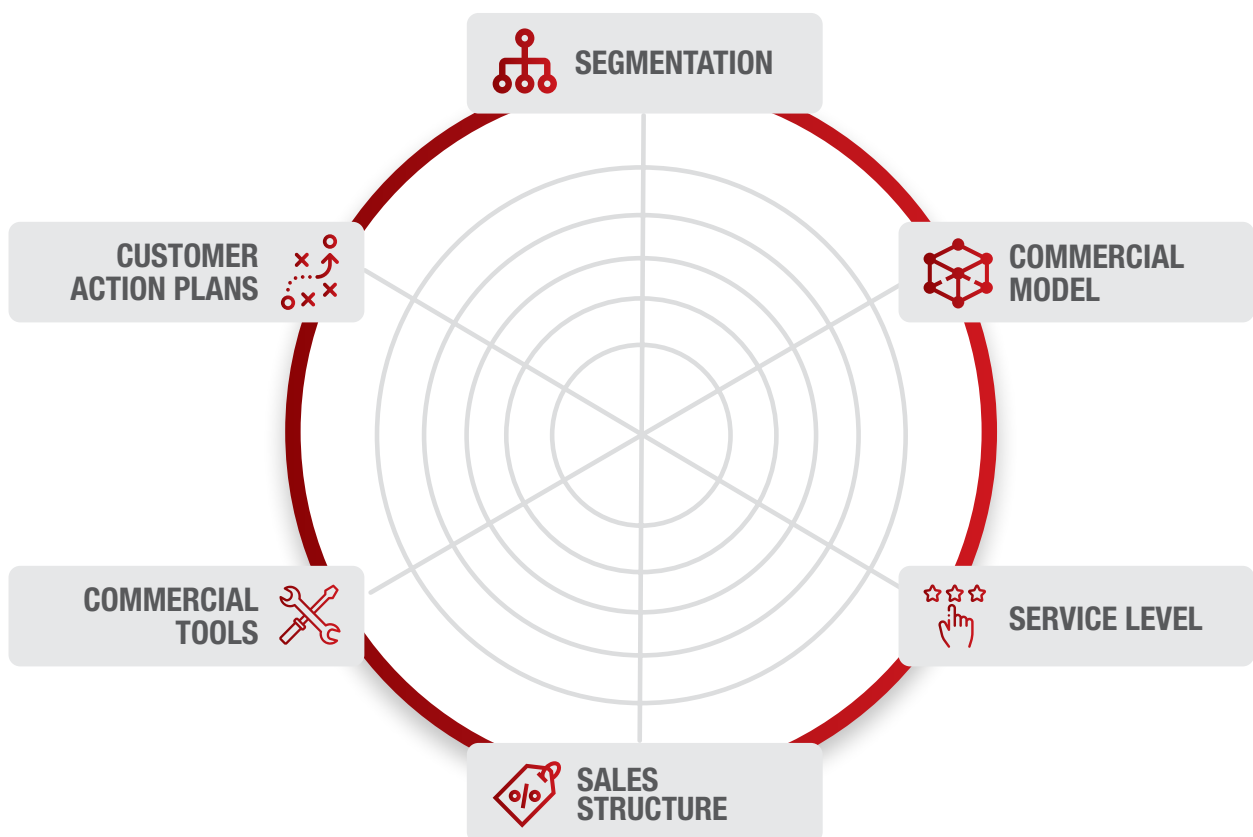
Ultimately, this led to prioritizing the in-country clients, but the B2B GTM also facilitated a strong service level design for overseas clients, who at times were more profitable than some (but not all) in-country clients. The cost-to-serve exercise further analyzed clients by country to prioritize sales opportunities.



ii. B2B Go-to-market Design

The second part of the Strategy-to-Execution Toolbox, B2B GTM Design, is composed of the six fundamental tools we use to ensure a new commercial strategy considers all opportunities. These tools represent choices, as well as vehicles for unique, actionable solutions. The classic approach considers each individual tool depicted below, starting with segmentation and working around to commercial model, service level, sales structure, commercial tools and customer action plans.

B2B GTM DESIGN



As a sub-component of the Strategy-to-Execution Toolbox, phase two, B2B GTM Design, is composed of six fundamental commercial strategy tools that are vehicles for unique, actionable solutions. (fig. 2)



SEGMENTATION

Taking into consideration information from the Market Foundation phase, this exercise evaluates companies within an industry or sector and groups those with similar needs.

Segmentation also encompasses evaluating the business interests of the company, for example, whether to focus on increased product volume in a specific region. It should set strategic objectives for each segment with similar needs and organize efforts around them, facilitating tailored discussions rather than serving clients as a whole.



COMMERCIAL MODEL

The commercial model will evaluate possible ways of serving each segment, leveraging the strategic objectives of the B2B GTM as a guide. These objectives define how each segment can contribute to the overall vision for your company. (Discussing a “cut line” – the point to which you are willing to serve a segment directly or indirectly – is imperative.)

While there are several traditional commercial models to choose from (direct sales, distributors, wholesale, brokers, e-commerce etc.), this is also the time to discuss innovation – how creative models can build differentiation for your business.



SERVICE LEVEL

The service level offered to each customer must be defined as a “package with a purpose” that feeds the goals of the segment. For instance, you might decide to up the ante on service to gain a higher share of wallet from a specific customer. With profitability in particular, many companies offer their clients the same service-level package without a clear idea of what it's costing them or how to adjust.

We view specialization by client as a key lever of the B2B GTM. However, as with the demand distribution index, the final decision must include considerations such as logistics and finance.



SALES STRUCTURE

Strategies surrounding sales structure are nearly always necessary to achieving the objective of the B2B GTM, and should synthesize the data and intelligence gathered about your product, regional opportunities, potential channels and customers. This will also bring focus to the role your sales force should play in each segment, and the seniority necessary among those employees to serve customers effectively (the size of the sales staff, needs for specialization by sector, region, product and more).

The output from these considerations is the ability to pinpoint where critical mass exists for certain needs and define structures accordingly.



COMMERCIAL TOOLS

The commercial tools designed during the B2B GTM offer prime opportunities to differentiate your business from competitors and add significant value to your model as a whole. This is where knowing what your clients value and whether their needs are being met can open doors to bespoke solutions.

Examples include loyalty programs, “pay for performance,” which establishes variables and targets that remunerate clients for reaching certain goals, and “take or pay,” which focuses on supplier and customer agreements on volume specifications.



CUSTOMER ACTION PLANS

Customer action plans are one of the final – and frequently most critical – products of the B2B GTM. In some cases, action plans can be focused on internal goals such as improving profitability and reviewing cost-to-serve factors (commercial structure costs, logistics costs, discounts, the product mix purchased by the client and more). In other circumstances, attention will be directed outward to increasing sales.

An exacting view of the cost-to-serve for each client and the factors that generate each line item are crucial to developing realistic, impact-driven customer action plans.

iii. Change Management and Implementation

It is hard to understate the value of change management and its impact on implementation. A company could possess unmatched technical skills and develop an iron-clad strategy, yet still fail if change management is not given consistent attention from the start of the transformation. This part of the new commercial strategy, the human element is the true X-factor, relying directly on each company's knowledge of its culture and people. It is imperative to tailor the implementation and the design of the B2B GTM to the reality of the organization.

For example, if the company has an aggressive culture, the implementation of the new commercial strategy might also be more aggressive — faster, with higher targets and increased pressure on stakeholders to manage new work fronts while maintaining existing ones. Or, it might be slower, methodical, and include pilot testing if that's how the company typically operates. In either scenario, actions that don't fit with the business culture risk employees feeling that the commercial strategy doesn't

make sense, doesn't match their values, and thus, they don't buy into the transformation.

While we believe professionals are frequently a company's most valuable asset, they can also be the ones who limit discussions, perpetuate old paradigms and bring resistance to change. Executives might also be guilty of adding to these problems, but it is their role to spread calm throughout the organization, as we believe most issues result from fear and poor communication. This is where the tactical role of the CEO, specifically, comes into play.

The CEO must steer the change-management effort in parallel with the design of the B2B GTM, which will be carried out by the commercial area and other departments. This gives many people in the company the opportunity to contribute to its future, while the CEO guarantees that all areas are on board and that the implementation strategy adheres to the company's culture. It should be the CEO who positions the balance of human vs. "technical" as a top priority, which includes three core aspects:

a. Commitment from the C-level. It's worth saying more than once. This is an essential, foundational component of positioning the new commercial strategy as a whole-company journey. In terms of change management, it is also the first step of the process. This effort must originate at the highest level of the business to ensure the B2B GTM is top of mind, organization-wide.

b. A multifunctional approach. Once the all-company journey is set in motion, a multifunctional approach to communications will kick off the buy-in process. This means announcing details of the B2B GTM to the key areas that will be impacted in a practical way. For instance, messages crafted for each department or audience group, shared through forums such as workshops or one-on-one conversations.

c. Stakeholder management. Stakeholder management is perhaps the most important element of the change-management process. Done effectively, it minimizes silos in thinking and helps professionals understand the motivations of the B2B GTM. While the multifunctional approach may address professionals in groups, stakeholder management means listening to individuals and preventing small concerns from getting bigger.



This should be done with honesty, sensibility and respect — and from the very beginning. It's important to remember, however, that communication does not mean making everyone happy and giving them what they want; it means ensuring they feel heard and know what to expect.

IMPLEMENTATION

Implementation is the point at which all elements of the Strategy-to-Execution Toolbox converge. It is also when change-management efforts will tangibly take shape. We

define implementation through three key steps, but to make these principles pragmatic relative to the CEO, here we'll focus specifically on how that role is embedded within each.

a. Define your strategic premise. The strategic premises of the GTM are what justify how the implementation will take place. For example, if the company is in financial trouble, a tight timeline and capturing results immediately could be the strategic premise.

Making this decision is precisely the CEO's role, as is formulating communications about these decisions. Defining the strategic premise should result in a roadmap of steps for the implementation to follow, and a calendar of when each milestone of the B2B GTM will be activated.

b. Implementation architecture. This takes the roadmap away from the CEO and details it so that the proposed timeline can be validated or challenged. At this stage, four elements should be discussed to build a full view of the implementation architecture:

- A complete list of all activities included in the B2B GTM
- How long each individual activity will take to complete
- Who is responsible for executing each activity
- How each activity is connected to those around it: what actions cannot take place until others are completed, and how each phase impacts the next. For example, if communications have not been completed, commercial work fronts cannot be implemented. This step should also analyze the availability of resources — if there are too many work fronts for the number of professionals, the CEO must decide if the timeline should be extended, or if other activities will be deprioritized.

c. Project management. Strong project management is how the implementation architecture (roadmap and timeline) is maintained. The project manager should serve as a liaison between the leaders of the work fronts and CEO.

The two primary responsibilities of the project manager are 1.) to coordinate the process and 2.) guard its design. For this reason, it is ideal for the project manager to be included in the B2B GTM from the design phase. The project manager should be able to streamline details into executive summaries, make connections between areas and identify actions in advance. Importantly, being able to recommend solutions rather than report progress and problems is key to boosting the CEO's capacity to make quick, effective decisions.



III. The B2B Cluster Framework: The Different Realities of B2B Go-to-market Design

Through the Strategy-to-Execution Toolbox serves companies of all types, the vast differences in products, services and business models of B2B companies equates to a diverse world with multiple realities. To continue refining your B2B GTM, our B2B Cluster Framework divides businesses into six clusters based on the demands they must fulfill, with our six classic tools prioritized among them.

The B2B Cluster Framework we present here is the result of analyzing more than 50 industries and sectors* and distilling the most prominent drivers of market dynamics and commercial demands across them. Variables that make a deep impact on a few sectors but are irrelevant to the majority have been eliminated from consideration. As a result, from dozens of possibilities, we

have arrived at a set of criteria that separates a wide scope of B2B businesses into six core clusters (although variation among internal business units may occur).

While our depth of experience is not exhaustive among all the sample industries within the framework, our cross-functional approach to consulting (by competence rather than industry) enables this wide view of similarities and differences between clusters.

If you find that variables that are important to certain segments of your business are not included, we encourage you to factor them into the segmentation tool of the B2B GTM Design stage. The goal here is to advance your ability to swiftly target the actions that mean the most to your cluster, and shed light on where opportunities have yet to be captured.

*Our B2B Cluster Framework draws upon company listings from Factiva, The Dow Jones Company, and industry classifications from the North American Industry Classification System. For more information, see the appendix at the end of this report.



i. Cluster Criteria

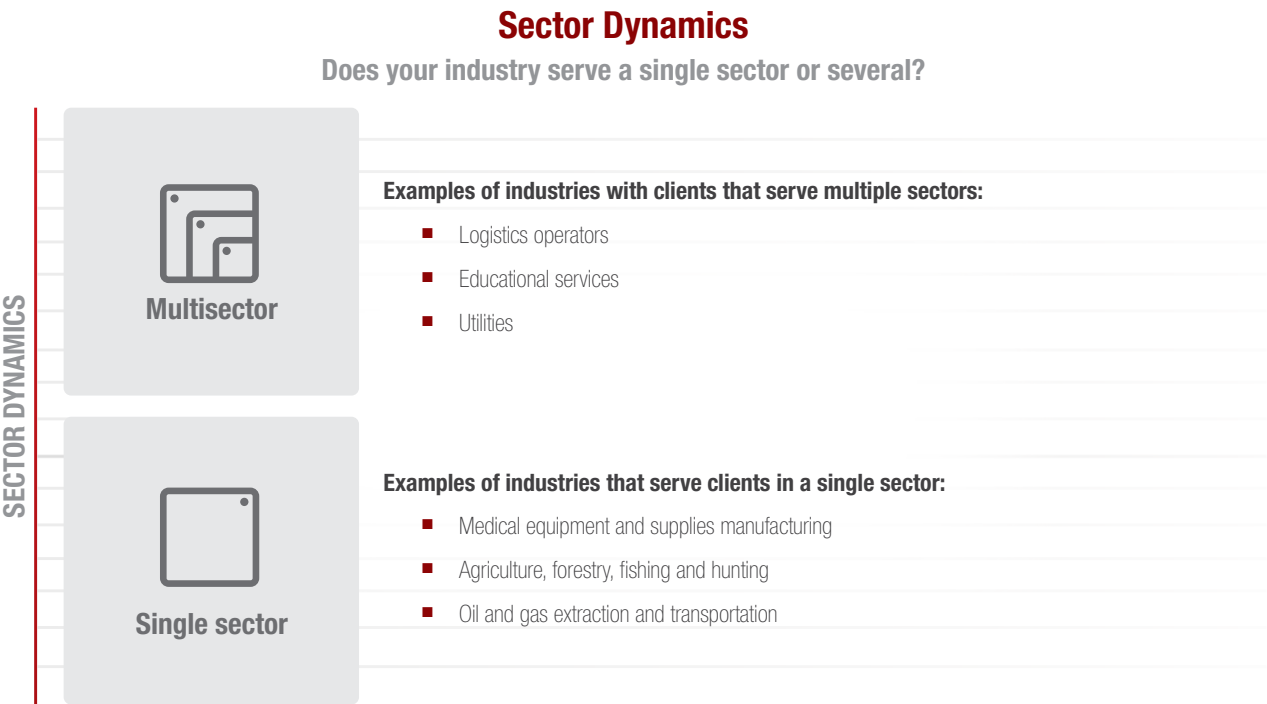
The B2B Cluster Framework divides companies based on a set of three simple criteria. As you review the questions below, keep track of your answers; we'll use them to plot your position on an X-Y axis and explore the dynamics of your cluster.

a. Sector Dynamics: “Does my business serve one sector or many?”

The number of sectors your business serves represents your Sector Dynamics, but how you answer this question isn't about volume — it's about your commercial model. If you serve many

sectors, for instance, it will be important to understand how your clients use your product or service, and any differences in purchasing processes. This will allow you to adapt your commercial model to your clients' needs, whether you decide to focus on a few sectors or all of them.

By comparison, if you sell to just one sector, knowing how opportunities are concentrated among clients is key. If large players represent a majority of your potential long-term contracts, customer loyalty and high service levels are important considerations.



b. Product / Service Dynamics: “How does my product or service impact my client’s reality? Is it core (essential) to their services, or complementary?”

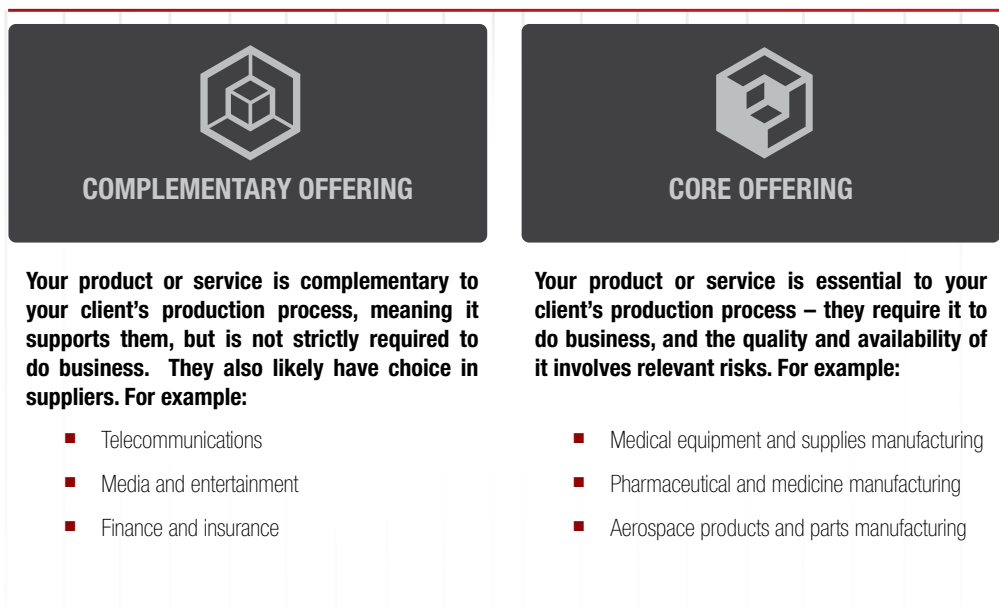
This step is about understanding to what extent you impact your client(s). Knowing your Product / Service Dynamics is not a question of your value, but assessing what percentage or portion of your product or service accounts for your clients’ production costs. Do you enable their offerings through product range, knowledge, service level and so forth, or do you facilitate what they make or offer through raw materials or other components?

If you are an enabler, your product or service is complementary, and if you are a facilitator, you are core – your clients cannot create their products or services without your company or another like it. Each situation corresponds to important actions and impacts.

For instance, pricing is all-important in core products, as upticks make a direct hit on your clients’ bottom line. By comparison, practical actions that ensure smooth service and dissuade customers from switching to competitors are of value for companies whose products or services are complementary.

Product / Service Dynamics

How essential is your product or service to your client’s production process?



Understanding whether your product is core or complementary for your clients has an impact on many tools of the B2B GTM, including your commercial model, commercial tools, service level, customer action plans and more. (fig 4)



c. Innovation Dynamics: “How important are innovations to my industry? Is innovation constant, or an opportunity to stand out?”

The way we answer this question is by determining whether innovation is a matter of “survive” or “differentiate” in your B2B world. Your response will dictate whether innovation must be embedded into the DNA of your company, or if doing so could help you win market share.

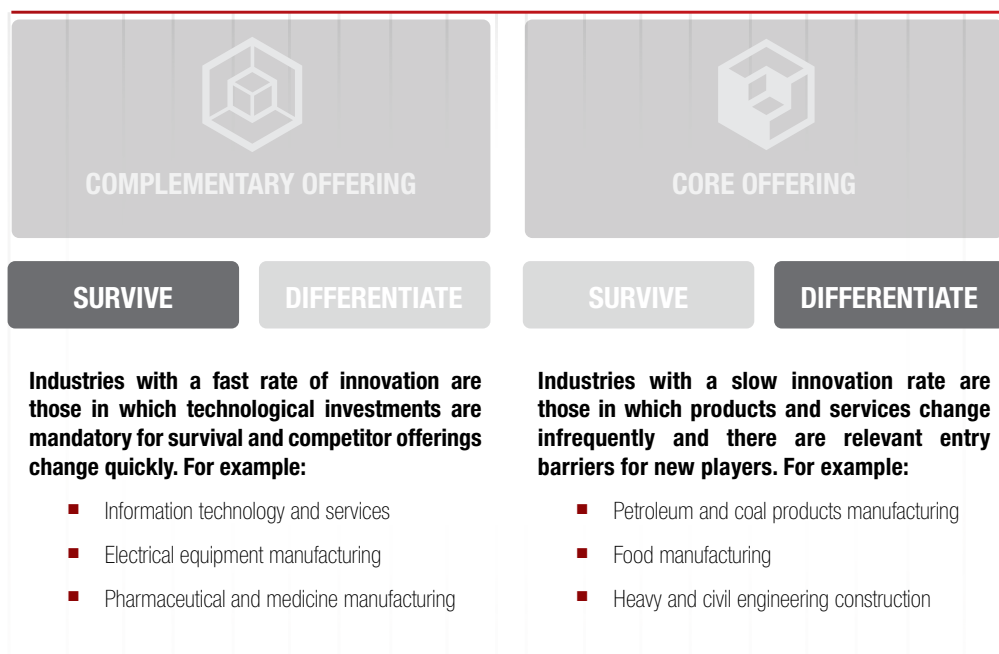
For example, digital companies must constantly turn over new products, fix bugs and anticipate new conveniences just to stay in the game. A paper products company, by contrast,

could introduce an innovation that improves margins and grabs attention, securing its future.

Commercial tools as opposed to models — processes over structures — gain relevance here for those that have the potential to differentiate. By comparison, processes that guarantee product or service turnover are crucial in the survive category. They also impact the B2B GTM in terms of the company's ability to communicate innovations to the market, the profile and technical ability of its professionals (sales force), how performance is assessed internally and other elements.

Innovation Dynamics

Does your B2B industry reside within a world that demands innovation to survive – or is innovation a tool that offers the possibility to differentiate from your competitors?



The importance of innovation to your B2B reality — a matter of survive or differentiate — is pivotal to determining how choices about product and services must be made, and if your company needs to embed specific capabilities among its professionals. (fig. 5)



With the answers to these criteria in hand, you are no doubt already forming ideas or asking questions that will drive key actions of the B2B GTM. Multisector, complementary, differentiate? Single sector, core, survive?

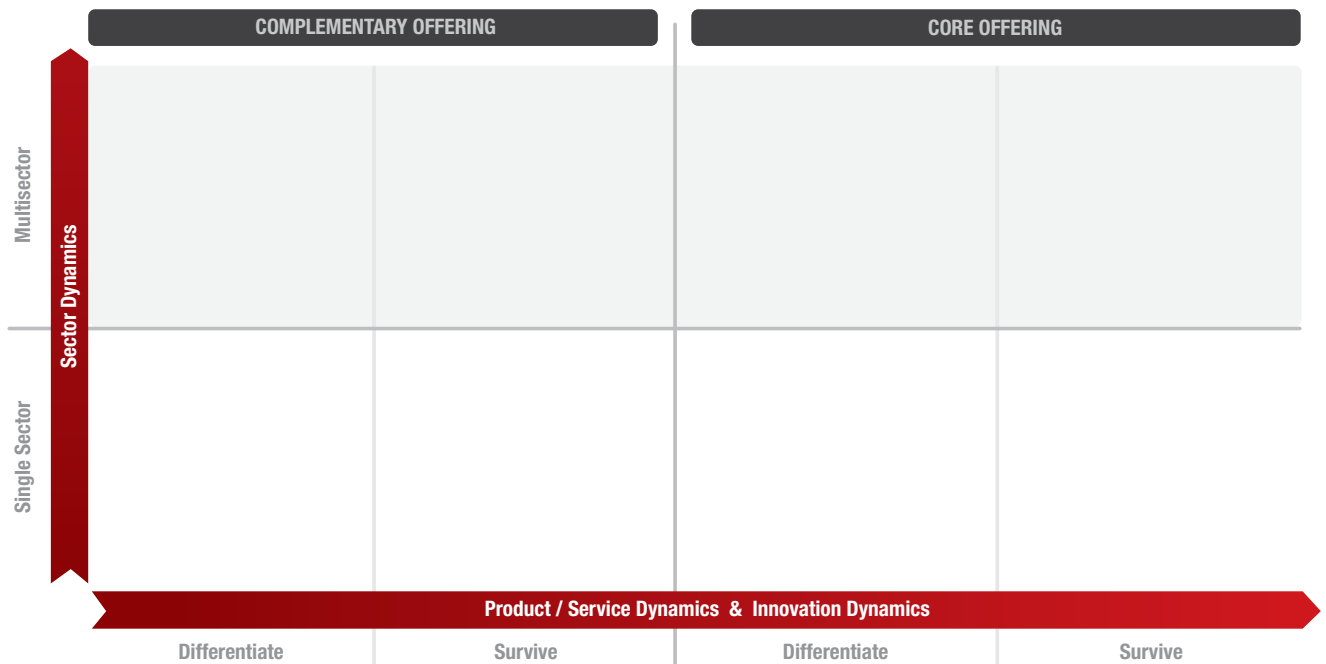
To begin plotting your position in the B2B Cluster Framework below, we've divided our three criteria between the X and Y axis, with Single Sector / Multisector corresponding to Y, and Product / Service Dynamics and Innovation Dynamics grouped into X. This delineates how you make your offering vs. the elements that influence your industry – your market dynamics compared to your commercial demands.



Innovation dynamics possibilities

It is important to note that the nature of innovation for your business exists within both the core and complementary Product / Service Dynamics. For example, your company could offer a core product with innovation as a requirement of survival, or a core product with innovation as a means of differentiation. Likewise, if your product or service is complementary, it is possible to fall within either the "survive" or "differentiate" quadrants.

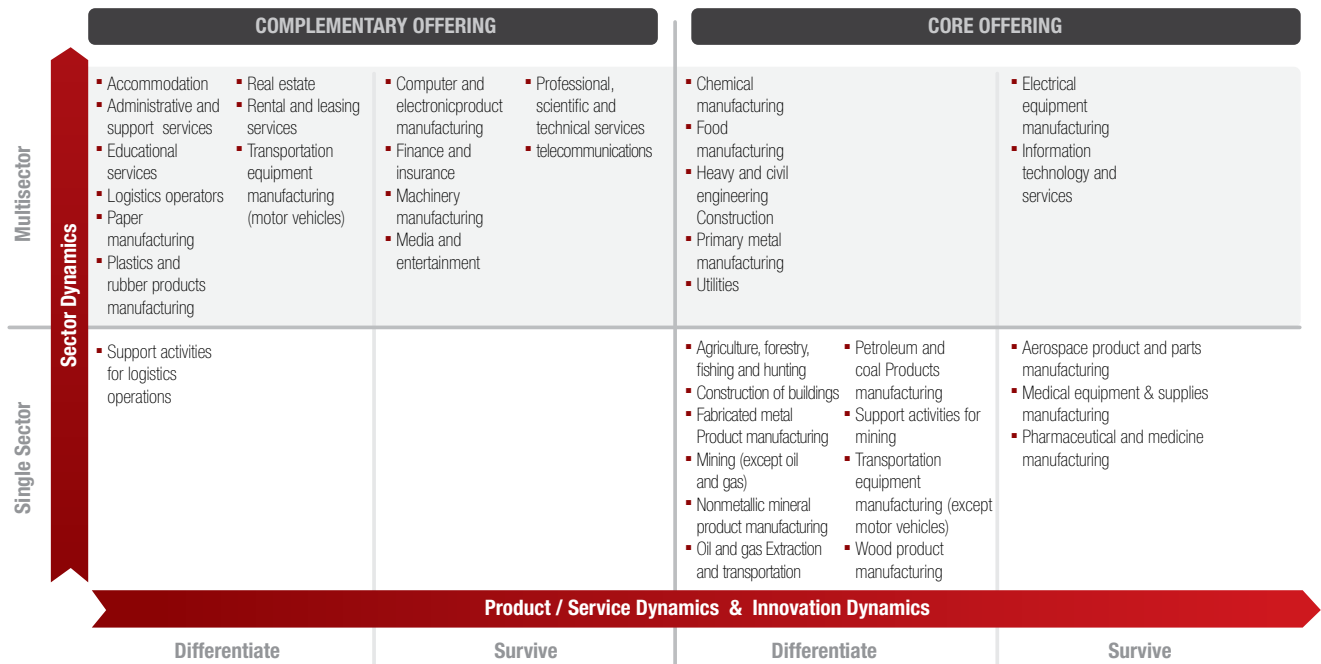
B2B Cluster Framework



The B2B Cluster Framework divides three criteria into Sector Dynamics vs. Product / Service Dynamics and Innovation Dynamics. (fig. 6)

To better understand where your company fits within the chart, consider the same frame again on the next page, this time with samples of how various industries and sectors are categorized by Sector Dynamics, Product / Service Dynamics and Innovation Dynamics.

B2B Cluster Framework



The clusters above apply to most industries and sectors, although may not be applicable to specific business units within a company. For examples of the companies within each cluster, see the appendix at the end of this report. (fig. 7)

Do you see where your business fits? Each title represents the essence of the demands that will drive the B2B GTM for that cluster. How well does your cluster name describe the needs of your business? Find a quick description of the each cluster's core characteristics on the following page.

B2B Cluster Framework



In our vision of how to approach a B2B GTM, companies are assessed by business and market demands rather than industry type. (fig. 8)



1. FOCUS & CONQUER

MULTISECTOR, COMPLEMENTARY OFFERING, INNOVATION DIFFERENTIATES

- The product or service differentiation is low in this cluster and is not essential to your clients' businesses.
- The B2B GTM should assess all possible sectors of your clients' businesses and define which to focus on and conquer, as the potential to differentiate will stem from the commercial model itself, creating barriers to clients changing suppliers and stimulating loyalty through exceptional service.



2. CONSULT TO DRIVE INNOVATION

MULTISECTOR, COMPLEMENTARY OFFERING, DEMANDS INNOVATION

- In this segment, innovation is fundamental to maintaining competitiveness in the market, but the product or service offering is not essential.
- The B2B GTM must consider the real needs of your customers to ensure that the product or service achieves its promised results. Structuring a sales advisory team will be critical to convincing the customer of your ability to meet the demand for future innovation.



3. OPTIMAL SERVICE LEVEL

MULTISECTOR, CORE OFFERING, INNOVATION DIFFERENTIATES

- Your product or service is essential to your clients' businesses, but each sector has its own needs.
- The B2B GTM needs to determine which sectors to specialize in, create differentials in each and generate value.
- Competition and pricing pressure are high – it is important to manage service levels and organize customers' roles through the B2B GTM.



4. CONVERT & PROTECT

SINGLE SECTOR, CORE OFFERING, INNOVATION DIFFERENTIATES

- The markets of these industries tend to be concentrated into specific customer types.
- The B2B GTM must include a tailored approach for large clients and long-term contracts to guarantee constant volume.



5. INNOVATION OBSESSION

SINGLE OR MULTISECTOR, CORE OFFERING, DEMANDS INNOVATION

- In this segment, your offering is highly interdependent on customer profitability, differentiation and, thus, success – your clients are experts in your product.
- The B2B GTM must foster innovation and technical skills. The market is constantly innovating, so to protect your customer base, entry barriers should be included and you must provide after-sales support to ensure good results for your clients.



6. MIGRATE OR BECOME EXPERT

SINGLE SECTOR, COMPLEMENTARY OFFERING, INNOVATION VARIABLE

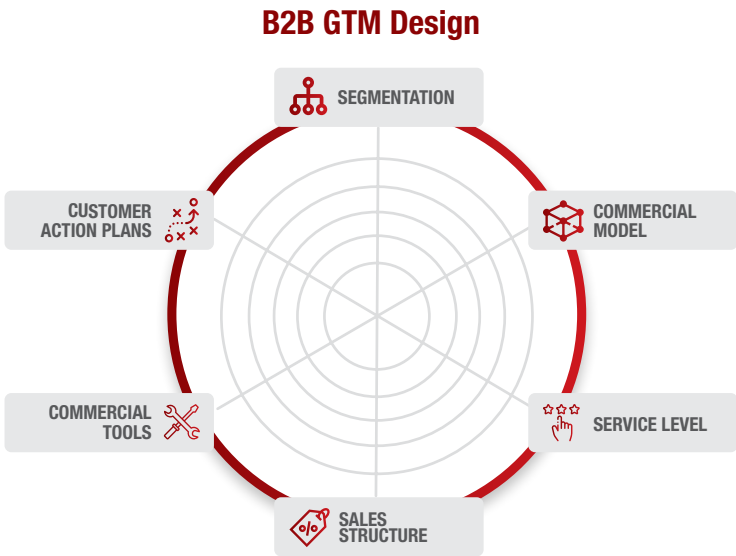
- As this is a segment of niche players, there is a risk of vertical integration: it may be feasible for the biggest clients to buy a product or service provider that becomes representative in their cost structure.
- The B2B GTM must consider that scale in this scenario requires global or international expansion, with solid market and/or niche expertise – or the company must become multisector.

ii. Challenges, Priority Tools and Solutions by Cluster

With an understanding of your cluster position, we'll now deep-dive into the full framework, including the challenges, solutions and priority tools that are most impactful within each group.

As we hand-select different tools to work with by cluster, we encourage you to consider that prioritizing some doesn't strictly

mean others should be eliminated — the tools we've chosen are simply the ones we believe have the greatest potential to generate results. To recall again the tools from the Strategy-to-Execution Toolbox, see the image below.



The B2B GTM Design phase is comprised of six fundamental tools that can be prioritized based upon the cluster to which the B2B company belongs. (fig. 9)

As each cluster offers specific information intended for different B2B company types, the full framework below can be used to jump to your section of interest — just click on the title that pertains to your cluster. Also, see the appendix at the end of the report for more detail and example companies by cluster.



Use the titles above to jump to your cluster of interest. (fig. 10)



1. FOCUS & CONQUER

The ability to differentiate products and services is low for companies in this cluster, and the products or services you sell are not essential to your clients' businesses – the potential to differentiate will stem from the commercial model itself.



Example Industries and Sectors In This Cluster

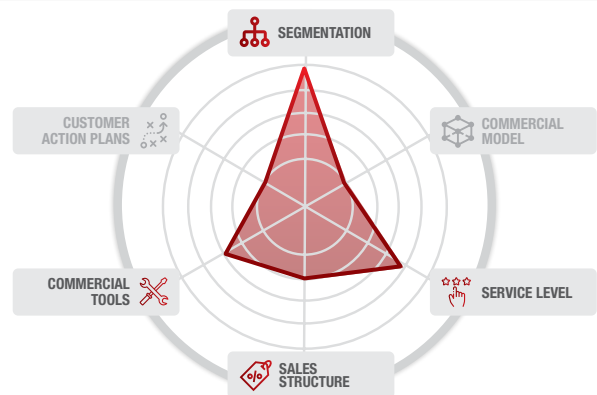
- Accommodation
- Administrative and support services
- Educational services
- Logistics operators
- Paper manufacturing
- Plastics and rubber products manufacturing
- Real estate
- Rental and leasing services
- Transportation equipment manufacturing (motor vehicles)

Challenges

- **Different needs and opportunities among sectors:** Your clients' needs are many and varied, particularly by sector. This creates opportunities, but you'll have to choose your battleground: "where to play."
- **Product has limited impact on business solutions:** Your product or service is not essential to your clients' businesses. They have a great deal of choice in whether or not to buy your product.
- **Low-entry barrier:** As innovation is not a factor in this cluster, the potential for competitors who offer similar products or services to court your clients is wide open.

Priority Tools

- **Segmentation:** Segmentation is the most important tool for the Focus & Conquer cluster. It enables discussing each sector your business specializes in and making choices about where you want to "focus and conquer." As your offering is complementary to your clients' products or services, the key to differentiation (or innovation if you choose) is concentrating on segments that afford new opportunity, or in which you can demonstrate better understanding of customers' needs compared to your competitors.
- **Service level:** Service levels are critical to maintaining your client base in this cluster. As your customers can obtain similar products or services from a variety of providers, guaranteeing smooth, hassle-free transactions is key to client retention.
- **Commercial tools:** Commercial tools are important to structuring entry barriers that prevent your clients from seeking other suppliers while giving you the opportunity to foster their loyalty.
- **Sales structure:** The sales structure of the B2B GTM has some relevance to your ability to specialize your commercial model by sector.



Solutions

- **Define your target sectors:** It is crucial to map your clients' sectors, needs and regions so that you can strategically choose in which areas to specialize. This should include evaluating the size of each opportunity and trends in growth (your ability to "win"). However, pay attention to overly complex segmentation results; the more specialized and demanding a client's segmentation is, the more difficult implementation will be.
- **Specialize by sector:** Given the multiple sectors of your clients and their specific needs (defined above), a commercial model that includes specialization is the most effective way to achieve the differentiation that your product or service cannot. This will not only guide the sales structure, pricing, contract approach etc., but allow you to target would-be clients precisely and convert them to customers. For example, specialization within the commercial model will require your sales force to understand demands per client and tailor commercial speeches accordingly, and approach how relationships are structured with flexibility, e.g. monthly vs. long-term contracts.
- **Focus on customer solutions and experience:** Guarantee the B2B GTM is able to deliver on its commercial speech and service-level agreements. However, avoid talking only about your product or service – emphasize solutions rather than comparisons among competitors. A multifunctional approach that brings areas such as logistics, marketing, IT etc. from your company to interface with counterparts inside the client's business is one interesting way to add value. This could happen directly or be centralized through your sales force, depending on the client and your strategy per sector. However, above all, be practical: your product or service should enable your clients to optimize their own businesses. If you create complications for them, they can easily seek support elsewhere.
- **Create entry barriers:** Going the extra-mile and paying attention to detail are strong differentials here; for example, loyalty programs, long-term contracts, system connectivity, and creative acknowledgements that honor the relationship (top client travel rewards/prizes).



2. CONSULT TO DRIVE INNOVATION

In this segment, innovation is fundamental to maintaining competitiveness in the market, but your product or service offering is not core to your clients.



Example Industries and Sectors In This Cluster

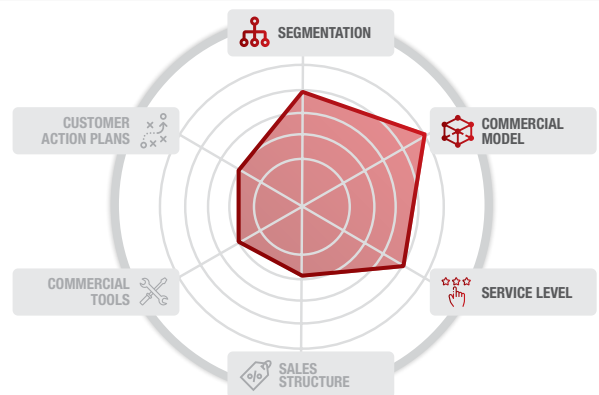
- Computer and electronic product manufacturing
- Machinery manufacturing
- Professional, scientific and technical services
- Telecommunications
- Finance and insurance
- Media and entertainment

Challenges

- **Different needs and opportunities per sector, with technical complexity:** Client needs are many and varied, particularly by sector. This creates opportunities, but in this cluster you'll be expected to understand and challenge those needs while demonstrating a high level of technical aptitude.
- **Ability to impact results:** Your product isn't core to your clients' businesses, but it drives their performance. Your support and ability to consult on high-level issues will be an ongoing requirement of service.
- **Innovation as an entry barrier:** The market and your competitors are constantly innovating, setting a high bar for attracting new business. However, at the same time, customers are always showing you ways to better serve their needs – even if the message is unspoken. Inefficient or ineffective innovation is frequently correlated with not understanding or listening to these demands.

Priority Tools

- **Commercial model:** The commercial model is the priority here and must guarantee a multifunctional, consultative, empathetic approach to your customer's needs. This is fundamental to maximizing your clients' performance. As their products or services are complex in nature, the road to results is not always obvious. Having an optimal commercial model in place can help keep and/or attract customers, even when matched against competitors who offer advanced innovations.
- **Segmentation:** Segmentation is a worthwhile exercise to define your target sectors, but the commercial model is more important to this cluster. The ability to narrow your focus based on sector information isn't as great, and capital investment needs to be spread out as much as possible.
- **Service level:** Service level is key to guaranteeing a whole solution that fulfills the complexity of the service or product. As explained above, in the face of constant innovations in the market, excellence in service can incentivize client loyalty when a new offer from a competitor proves interesting.



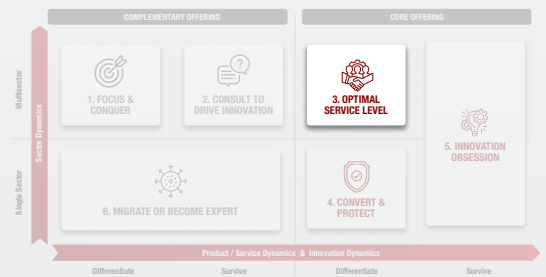
Solutions

- **Define your target sectors:** It is crucial to map your clients' sectors, needs and regions so that you can strategically choose in which areas to specialize. This should also include evaluating the size of each opportunity and trends in growth (your ability to "win"). It is important to note that you may also choose to not specialize the commercial design of the B2B GTM by sector, but it is still key to identify your targets so that you can make decisions about how to own and protect them.
- **Build qualified/consulting sales and business empathy:** The selling process is not obvious – your sales structure must be advanced in capability and able to manage several steps. This should cover competencies such as obtaining a good briefing from the client; decoding and challenging underlying needs the client may not be aware of; suggesting solutions for products or services in a way that meets specific needs; and delivering results-oriented pitches that emphasize service. However, these actions are about more than technical execution – having the right professionals to serve as true partners to your clients holds high potential for differentiation.
- **Create a high-performing, multifunctional sales force:** To guarantee results after the sale, the commercial area must maintain the connection and relationship with the client, but also ensure the connection of other areas – the salesperson should assume the role of problem-solver and build bridges within a multifunctional team.
- **Devote yourself to results:** Your ability to impact your clients' performance creates an interdependent relationship, which means focusing on the results of your product or service is imperative. This includes results-monitoring, training and after-sale routines.
- **Utilize the commercial area to spark innovation:** Challenge your commercial area to bring in feedback from the market, generate discussion and come up with actionable ideas for innovation. Always be thinking one step ahead.



3. OPTIMAL SERVICE LEVEL

Your product or service is essential to your clients' businesses, but each sector has its own needs. The B2B GTM approach must determine in which sectors to specialize, create differentials for each and most importantly, generate value. Competition and pressure on pricing are high.



Example Industries and Sectors In This Cluster

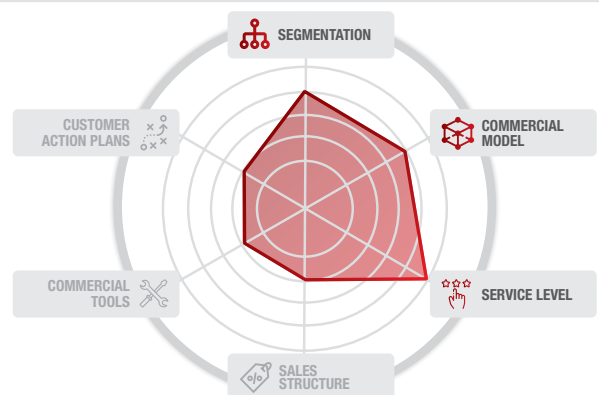
- Chemical manufacturing
- Food manufacturing
- Heavy and civil engineering construction
- Primary metal manufacturing
- Utilities

Challenges

- **Multiple applications and specifics:** There are multiple sectors that use your product and each one has specific applications, needs and characteristics. You must consider several different realities and serve several different worlds.
- **Strong correlation between product and client performance:** As your product is core to all customers, any change in cost or performance will make a huge impact – the degree of specificity and requirements will be very high both before and after the sale. You must guarantee results.
- **High-stakes price pressure and competition:** Although the product is core, innovation is low, putting intense pressure on pricing and requiring excellent revenue and cost-management controls. What you offer represents a top expense for your clients, so the effort to maintain productivity and scale-related cost optimization must be continuous. Competitors will increase pressure on pricing to lure away your clients.
- **High service-level demand:** Any gaps in product supply will cost you customers, so the pressure on service level is just as high as the pressure on pricing. There is always “qualification criteria” in this cluster – a minimum level of service you must offer or otherwise be knocked out of the game. However, clients will be open to integrating supply chains and creating seamless processes between your two companies that reduce the risk of operational issues and secure the relationship.
- **Large stakeholders and long decision-making process:** Since your product makes a huge impact on your clients' results, selling to this cluster entails a strict and detailed process, including quality-assurance testing for consistency. You'll also need to convince senior executives that your business can handle the job.

Priority Tools

- **Service level:** The service-level definition is crucial in this cluster to the ability to adjust cost-to-serve numbers and control profitability. Having a clear picture of service level by segment will guide the path for each client type, including where to avoid unnecessary over-investment in service, which can incur costs that are disproportionate to the size of the opportunity (see Solutions below).
- **Segmentation:** In the multisector scenario of this cluster, segmentation is required to define which sectors you want to focus on. There are likely many possibilities in this group, and choices must be made about where to specialize among clients who have high demands and are tough to serve. However, despite your product being core, your clients may represent different maturity levels by industry, providing variable opportunities for profitability and innovation.
- **Commercial model:** This tool has relevance because you'll need to be able to convince a large, high-level group of stakeholders of your ability to meet their needs through a detailed process. A multifunctional approach can be of benefit in this scenario by leveraging expertise beyond the commercial team (technical, IT etc.) to differentiate your value proposition from competitors.



Solutions

- **Specialize by sector:** Given the multiple sectors of your clients and their specific needs, a commercial model that includes specialization is the most effective way to achieve the differentiation that your product or service cannot. This will not only guide the sales structure, pricing, contract approach etc., but allow you to target would-be clients precisely and convert them to customers. For example, specialization within the commercial model will require your sales force to tailor commercial speeches, and approach how relationships are structured with flexibility, e.g. monthly vs. long-term contracts.
- **Control client profitability:** Competition in this segment tends to be high due to the lack of innovation and huge pressure on pricing, making it necessary to control cost and revenue. With cost, you must evaluate the cost-to-serve for each client and define specific roles. It is possible to serve an unprofitable client group to maintain a foothold or demonstrate expertise in a particular area. However, this decision should be made as part of a wider strategy, with your commercial model, service levels and action plans all aligned. It is crucial that the revenue management area act on the top line of each client.
- **Increase and/or generate entry barriers:** Going the extra-mile and paying attention to detail are strong differentials here – for example, loyalty programs, long-term contracts, system connectivity, and creative acknowledgments that honor the relationship (top client travel rewards/prizes).
- **Sell tech support as a differential:** Tech support maximizes product performance in your clients' businesses. In some cases, there is an opportunity to capitalize on that need by offering it as a specific service. It's an interesting strategy that can also increase loyalty and generate entry barriers. If this is a possibility, the B2B GTM is the time to capture it. Similarly, tech support plays a role in the sales process because some sectors require external approvals to change suppliers (e.g. Anvisa, FDA), including product testing, prototypes, product consistency and more.
- **Segment your reality:** Determining which sectors require innovation and which require pricing and streamlining strategies is a critical need for this cluster. A hierarchical scheme that divides clients strategically will result in a pipeline of innovation for core sectors and create a secondary market to absorb the previous cycle of successfully implemented products.
- **Segment your tone of voice:** Due to your product being core, there is continuous pressure to optimize performance. However, be conscious about the “tone” you take with different stakeholders. Professionals on the procurement side will zero in on productivity and costs while engineers will focus on improving quality and processes.
- **Innovate from within:** There is no space within a core product offering or client relationship for unexpected issues or supply disruption. We recommend innovating inside existing customer accounts, with a step-by-step prototyping process and open feedback loop that supports continuous improvement.



4. CONVERT & PROTECT

The markets of these industries tend to be concentrated into specific customer types; the B2B GTM must include a tailored approach for large clients and long-term contracts to guarantee constant volume.



Example Industries and Sectors In This Cluster

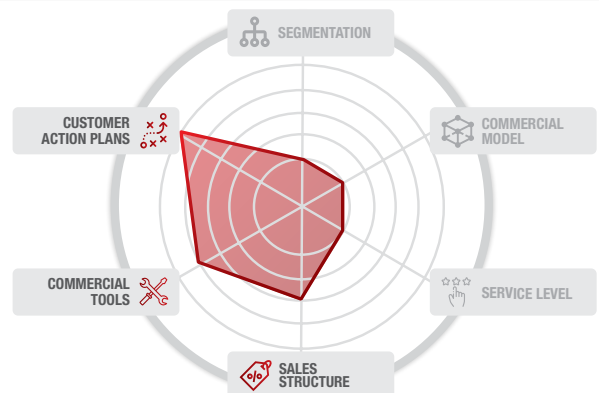
- Agriculture, forestry, fishing and hunting
- Mining (except oil and gas)
- Petroleum and coal products manufacturing
- Transportation equipment manufacturing (except motor vehicles)
- Construction of buildings
- Nonmetallic mineral product manufacturing
- Support activities for mining
- Wood product manufacturing
- Fabricated metal product manufacturing
- Oil and gas extraction and transportation

Challenges

- **Customer concentration:** The customers within this cluster are concentrated by industry, the scope of which may vary but always exists. This situation increases the bargaining power of large customers and also your dependency on them. You must conquer them – or otherwise struggle to secure bits and pieces from the remnants of a picked-over market.
- **Strong correlation between product and client performance:** As your product is core to all customers, any change in cost or performance will make a huge impact: the degree of specificity and requirements to gain your clients' business will be very high both before and after the sale. You must guarantee results.
- **High-stakes price pressure and competition:** Although the product is core, innovation is low, putting intense pressure on pricing and requiring excellent revenue and cost management. Competitors will increase pressure on pricing to lure away your clients.
- **High service-level demand:** Any gaps in product supply will cost you customers, so the pressure on service level is just as high as the pressure on pricing. There is always "qualification criteria" in this cluster – a minimum level of service you must offer or otherwise be knocked out of the game.
- **Large stakeholders and long decision-making process:** Since your product makes a huge impact on your clients' results, selling to this cluster entails a strict and detailed process, including quality-assurance testing for consistency. You'll also need to convince senior executives that your business can handle the job.

Priority Tools

- **Customer action plans:** Having specific plans for each client is crucial for this cluster.
- **Commercial tools:** Commercial tools will support increasing the volume of large clients, and must also be matched by financial tools and capabilities.
- **Sales structure:** Sales structure is of moderate importance yet requires a relatively sophisticated level of capability – a dedicated senior salesperson should be able to have strategic commercial discussions, design action plans and manage commercial tools. It is possible to leverage a multifunctional approach here by bringing in expertise beyond the commercial team (technical, IT etc.) to differentiate your value proposition from competitors. Being able to offer a one-stop shop for your clients is a strong lever for increasing revenue and profit in client segments or accounts that represent higher levels of market saturation.



Solutions

- **Tailor the approach to large clients:** The commercial model must be custom-designed for each large client – understanding their needs in detail is the first step to acquiring their business. This requires the sales team to function as a true consultant to your clients, including knowing the locations of their plants, how their logistic operations work, their financial results and more. A senior salesperson should be exclusively dedicated to each client and able to support strategic discussions without any of the conflict that would come from also serving competitors.
- **Create long-term contracts and/or offer "progressive discounts":** Once you "conquer" your large target clients, securing their volume for as long as you can is the goal. Considering that service-level agreements are critical in this cluster and there is a strict procurement process, if you can guarantee both of these elements, the client will have an interest in maintaining the relationship. From this position, you can develop fair long-term contracts that cover all needs – service-level agreement, pricing formula, estimated volume and so on. Progressive discounts can incentivize the customer as well, concentrating their volume in your business and minimizing the role of other suppliers.
- **Control client profitability:** Competition in this segment tends to be high due to the lack of innovation and huge pressure on pricing, making it necessary to control cost and revenue. With cost, you must evaluate the cost-to-serve for each client and define specific roles. It is possible to serve an unprofitable client group to maintain a foothold or demonstrate expertise in a particular area. However, this decision should be made as part of a wider strategy, with your commercial model, service levels and action plans all aligned. It is crucial that the revenue management area act on the top line of each client.
- **Sell tech support as a differential:** Tech support maximizes product performance in your clients' businesses. In some cases, there is an opportunity to capitalize on this need by offering it as a specific service. It's an interesting strategy that can increase loyalty and generate entry barriers. If this is a possibility, the B2B GTM is the opportune time to capture it. Similarly, tech support plays a role in the sales process, as some sectors require external approvals to change suppliers (e.g. Anvisa, FDA), including product testing, prototypes, product consistency and more.



5. INNOVATION OBSESSION

In this cluster, your offering is highly interdependent on your customer's profitability, differentiation and thus, success — your clients are experts in your product. The B2B GTM must foster innovation and technical skills to meet the demands of constant turnover in the market.



Example Industries and Sectors In This Cluster

SINGLE SECTOR

- Aerospace product and parts manufacturing
- Medical equipment & supplies manufacturing
- Pharmaceutical and medicine manufacturing

MULTI-SECTOR

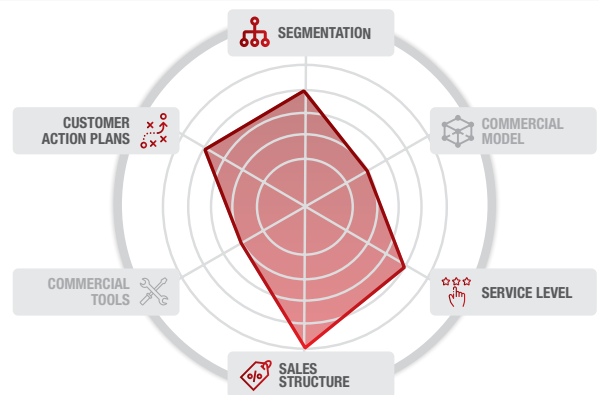
- Electrical equipment manufacturing
- Information technology and services

Challenges

- **Constant innovation:** Your product or service is core for your customers, and at the same time, the market is constantly innovating, generating a continual fight against becoming obsolete — either you have the latest product or you are behind everyone else. This creates an opportunity to conquer new clients through innovation, but as soon as your competitors innovate, you'll need to protect your clients from them.
- **All new concepts require teaching and proving:** If your offer is new to the market, you'll need to teach your clients about it, prove its differential and also support use after the sale. It's important to consider that customers begin looking for new suppliers because they need better results, so ensuring your clients very clearly understand the benefits of your product or service is a top priority.
- **Innovation as an entry barrier:** The market and your competitors are constantly innovating, setting a high bar for attracting new business. However, at the same time, customers are always showing you ways to better serve their needs — even if the message is unspoken. Inefficient or ineffective innovation is frequently correlated with not understanding or listening to these demands.

Priority Tools

- **Sales structure:** In this cluster, the sales structure should focus on identifying the correct profile and role of the salesperson, so as to boost the B2B GTM. After-sales support is required due to the demand for a high level of technical competency, in turn leading to the need for a well-qualified sales force.
- **Service level and customer action plans:** You need to guarantee a strong level of service for your customers, so they have the necessary support to achieve competitive results with innovative products. Specific action plans for each customer are key to acquiring their business and being able to adjust your solutions.
- **Segmentation:** In a multisector scenario, segmentation is needed to define which sectors you want to focus on.



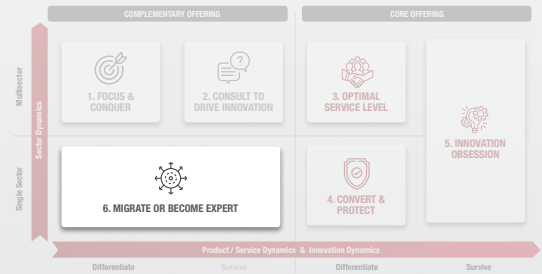
Solutions

- **Maintain a strong, technically robust sales force:** Your product is core and innovation is constant — your sales force must be able to explain innovations in a simple yet detailed way to truly make them clear for the client, and also because the client will employ tech experts to understand your product. As the impact of your product or service is critical for your (potential) customers, tech innovations must be substantial enough to justify a supply change.
- **Guarantee after-sales support to ensure results:** Related to the above, embedding tech support into the B2B GTM will ensure best possible use of your product or service and maximize results for your clients. This service step also minimizes the risk of substitution or losing customers when another innovation comes along.
- **Preserve balance:** Ensure the B2B GTM design optimizes the time and competencies invested in the relationship with the client, including the time you're willing to spend on technical support, marketing, business development and transactional activities. You may have to segment teams according to these competencies to boost (and maintain focus on building) value for both sides.
- **Increase and/or generate entry barriers:** Going the extra mile and paying attention to detail are strong differentials here — for example, loyalty programs, long-term contracts, system connectivity, and creative acknowledgements that honor the relationship (top client travel rewards/prizes).
- **Utilize the commercial area to spark innovation:** Challenge your commercial area to bring in feedback from the market, generate discussion and create actionable ideas for innovation. Always be thinking one step ahead.
- **Define target sectors and specialize (multisector):** For companies that serve multiple sectors in this cluster, defining your targets and evaluating the size of opportunities (your ability to win customers) requires specializing your commercial model per client to understand their needs and connect them to a more effective sales process.
- **Make or buy — but ensure you serve the market:** Guarantee you have a good grip on solutions and your product portfolio, but also a roadmap for innovation. New ideas and solutions can arise from start-ups, meaning you may need to choose strategic partners to avoid losing space or pace in future discussions.



6. MIGRATE OR BECOME EXPERT

In this cluster, there is a risk of vertical integration: it may be feasible for large clients to buy a product or service that becomes representative in their cost structure. The B2B GTM must consider that scale in this scenario requires global or international expansion, with solid market and/or niche expertise – or the company needs to become multisector.



Example Industries and Sectors In This Cluster

- Support activities for logistics operations

Challenges

- **Naturally challenging:** Being complementary and offering your product to a single sector exposes you to financial risks and critical-mass limitations, which is why fewer businesses are found in this cluster.
- **Requires detail, depth and unique expertise:** Clients will seek your products or services to support demands they cannot solve – this often entails urgency and the need for intervention, requiring broad technical and practical understanding of your specific sector.
- **Handle “make or buy” decisions:** The client may be able to do what you are doing or choose to contract your product or services continually. Over time, they will have to make long-term decisions about whether to buy or offset your offering.
- **Leads to dependence:** As you depend on a single source of revenue, you will naturally be exposed to market fluctuations.

Solutions

- **Continue building your track record, experience:** Your knowledge of your field needs to be wider and more detailed than your clients and competitors – this means constantly deep-diving into technical aspects, innovation and being forward-thinking.
- **Maintain a strong, technically robust sales force:** Your product is core and innovation is constant – your sales force must be able to explain innovations in a simple yet detailed way to truly make them clear for the client, and also because the client will employ tech experts to understand your product. As the impact of your product or service is critical for your (potential) customers, tech innovations must be substantial enough to justify a supply change.
- **Network, focus on developing your profile as an influencer:** Develop a profile as an influencer – someone who knows, drives and projects trends within your field of expertise.

IV. Completing the B2B Go-to-market: Different Realities, Different Choices

Companies pursue B2B GTMs for a variety of reasons – some for the promise of conquering new horizons, increasing profits or capturing market share. Others to keep pace with innovation, invigorate their commercial identity or attain clarity about financial results. Whatever the reason, we know transformation is intrinsically hard and difficult to articulate, much less pollinate throughout an entire organization.

For this reason, how you choose to approach the journey is as important as reaching its endpoint. We began by saying that linking strategy to execution is a top concern of the CEOs we work with, and that GTMs are naturally effective in solving this problem. However, the success of implementation hinges on paying consistent attention to culture and change

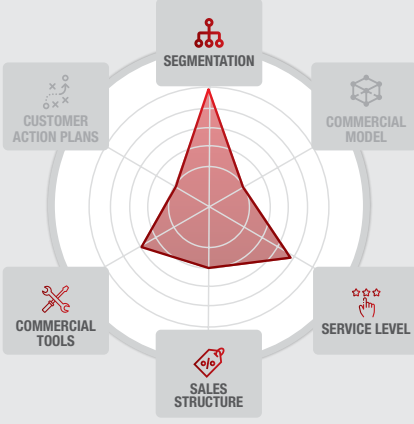
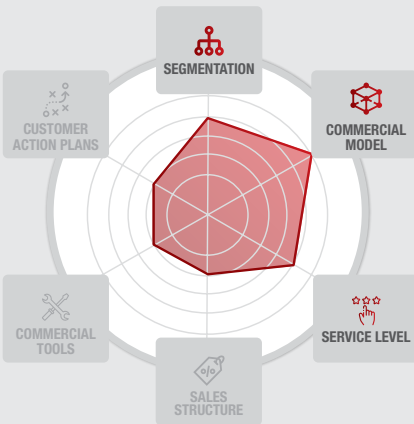
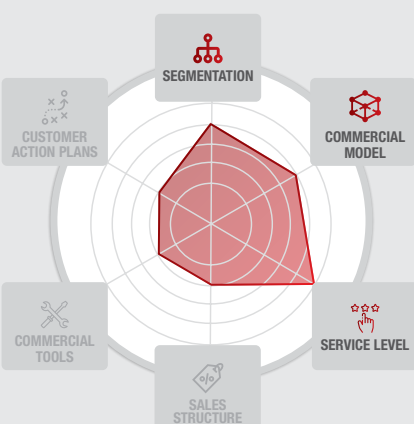
management, which we believe is a truth that can be applied to any challenge your organization faces.

The road ahead will undoubtedly be challenging, requiring adjustment and complex choices. There are no ready-made solutions – at least not ones that will be as effective as a fresh, bespoke commercial strategy design. There are, however, tools that can be effectively tailored to your reality.

In the end, a truly transformative B2B GTM – one that accelerates specific objectives and advances the success of your company and its professionals – requires striking a careful balance between technical expertise and implementation in the specific context of your business. Consistently turning to reality as the guide to your B2B GTM is the best way to not only position your company for success but achieve it.



Download The B2B Cluster Framework – Full Matrix

B2B CLUSTER	CHALLENGES	PRIORITY TOOLS	SOLUTIONS
 1. FOCUS & CONQUER Multisector complementary offering innovation differentiates - Accommodation - Administrative and support services - Educational services - Logistics operators - Paper manufacturing - Plastics and rubber products manufacturing - Real estate - Rental and leasing services - Transportation equipment manufacturing (motor vehicles)	Different needs and opportunities among sectors: client needs are many and varied Product has limited impact on business solutions: your clients have many choices Low-entry barrier: you have many competitors with similar products		Define your target sectors: evaluate opportunities; where can you "win"? Specialize by sector: tailor commercial models and service precisely Focus on customer solutions and experience: focus on solutions, not comparisons Create entry barriers: go the extra mile
 2. CONSULT TO DRIVE INNOVATION Multisector complementary offering innovate to survive - Computer and electronic product manufacturing - Finance and insurance - Machinery manufacturing - Media and entertainment - Professional, scientific and technical services - Telecommunications	Different needs and opportunities per sector, with technical complexity: client needs are many and varied + highly technical Ability to impact results: your product isn't core, but impacts results Innovation as an entry barrier: the bar is high on attracting new business		Define your target sectors: evaluate opportunities; where can you "win"? Build qualified/consulting sales and business empathy: sales capacity must be advanced and technically well-executed Create a high-performing, multifunctional sales force: maintain connections and solve problems after the sale Devote yourself to results: results are imperative – devote yourself to monitoring, training and ongoing support Utilize the commercial area to spark innovation: develop actions for innovation; always think one step ahead
 3. OPTIMAL SERVICE LEVEL Multisector core offering innovation differentiates - Chemical manufacturing - Food manufacturing - Heavy and civil engineering construction - Primary metal manufacturing - Utilities	Multiple applications and specifics: you must consider several different realities and serve several different worlds Strong correlation between product and client performance: you must guarantee results High-stakes price pressure and competition: competitors will increase pressure on pricing to capture your clients High service-level demand: any gaps in product supply will cost you customers Large stakeholders and long decision-making process: selling includes a strict and detailed process, with quality-assurance testing		Specialize by sector: meet the needs of each sector precisely Control client profitability: evaluate cost-to-serve of each client and define specific roles; revenue management must act on top line Increase and/or generate entry barriers: go the extra mile Sell tech support as a differential: maximize product performance in your clients' businesses Segment your reality: determine which sectors require innovation, pricing or streamlining strategies Segment your tone of voice: speak to different audiences with regard to their area of focus, e.g. procurement vs. product engineering Innovate from within: there is no space for supply disruption; test prototypes within existing accounts

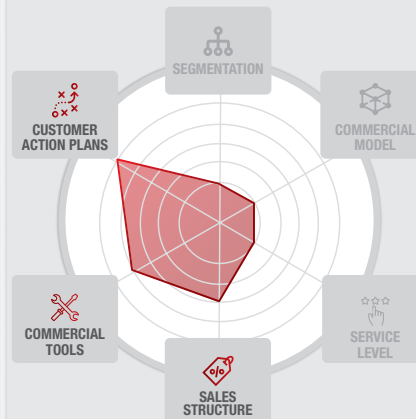


4. CONVERT & PROTECT

Single sector core offering innovation differentiates

- Agriculture, forestry, fishing and hunting
- Construction of buildings
- Fabricated metal product manufacturing
- Mining (except oil and gas)
- Nonmetallic mineral product manufacturing
- Oil and gas extraction and transportation
- Petroleum and coal products manufacturing
- Support activities for mining
- Transportation equipment Manufacturing (except motor vehicles)
- Wood product manufacturing

- **Customer concentration:** you are dependent on large players with bargaining power
- **Strong correlation between product and client performance:** you must guarantee results
- **High-stakes price pressure and competition:** competitors will increase pressure on pricing to capture your clients
- **High-service level demand:** any gaps in product supply will cost you customers
- **Large stakeholders and long decision-making process:** selling includes a strict and detailed process, with quality-assurance testing



- **Tailor the approach to large clients:** the commercial model must be custom-designed, with dedicated salespeople who are true consultants
- **Create long-term contracts/offer "progressive discounts":** secure volume for as long as possible, including specific incentives
- **Control client profitability:** evaluate cost-to-serve of each client and define specific roles; revenue management must act on top line
- **Sell tech support as a differential:** maximize product performance in your clients' businesses



5. INNOVATION OBSESSION

Single or multisector core offering innovate to survive

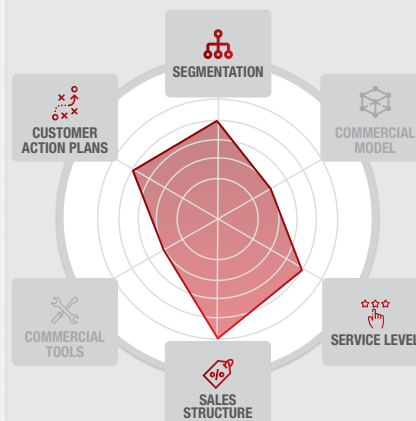
SINGLE SECTOR:

- Aerospace product and parts manufacturing
- Medical equipment & supplies manufacturing
- Pharmaceutical and medicine manufacturing

MULTISECTOR:

- Electrical equipment manufacturing
- Information technology and services

- **Constant innovation:** either you have the latest product, or you are behind everyone else
- **All new concepts require teaching, proving:** ensuring your clients clearly understand the benefits of your product or service is a top priority
- **Innovation as an entry barrier:** the bar is high on attracting new business



- **Maintain a strong, technically robust sales force:** explain your product or service simply yet in detail
- **Guarantee after-sales support to ensure results:** embedding tech support will minimize the risk of losing customers
- **Preserve balance:** ensure the B2B GTM optimizes the time and competencies invested
- **Increase and/or generate entry barriers:** go the extra mile
- **Utilize the commercial area to spark innovation:** develop actions for innovation; always think one step ahead
- **Define target sectors and specialize (multisector):** tailor the commercial model for an effective sales process
- **Make or buy – but ensure you serve the market:** guarantee solutions and your product portfolio, but have a roadmap for innovation



6. MIGRATE OR BECOME EXPERT

Single sector complementary offering innovation variable

- Support activities for logistics operations

- **Naturally challenging:** high exposure to financial risk and critical-mass limitations
- **Requires detail, depth and unique expertise:** client demands are often urgent and require intervention
- **Handle "make or buy" decisions:** clients may be able to do what you do
- **Leads to dependence:** exposure to market fluctuations

Not Applicable

- **Continue building your track record, experience:** your knowledge must be wider and deeper than clients/competitors
- **Maintain a strong, technically robust sales force:** explain your product or service simply yet in detail
- **Network, focus on developing your profile as an influencer:** be someone who knows, drives and projects trends

Appendix

Throughout part three, section two (Challenges, Priority Tools & Solutions by Cluster), we provided examples of the B2B industries and sectors included in the B2B Cluster Framework. The following appendix lists sample companies within each cluster, provided courtesy of Factiva, The Dow Jones Company, and classified according to the North American Industry Classification System, except where denoted with an *. In these limited cases, Integration has chosen a preferred classification title that we believe best expresses the products or services of the companies included in that industry or sector.



1. FOCUS & CONQUER

EXAMPLE INDUSTRIES AND SECTORS CLASSIFICATION	EXAMPLE COMPANIES	TYPE
Accommodation	- Hilton Worldwide Holdings, Inc. - Hyatt Hotels Corp. - Marriott International, Inc. - Wyndham Destinations, Inc.	Hotels (except Casino Hotels) and Motels
Administrative and support services	- Adecco Group AG - ManpowerGroup, Inc. - Securitas AB - Sodexo SA	Employment Placement Agencies; Temporary Help Services; Janitorial Services; Waste Management and Remediation Services; Investigation and Security Services
Educational services	- Apollo Education Group, Inc. - CAE, Inc. - Laureate Education, Inc.	Colleges, Universities, and Professional Schools; Professional and Management Development Training
Logistics operators*	- DHL International GmbH - FedEx Corp. - Royal Mail PLC - United Parcel Service, Inc.	Couriers and Express Delivery Services; Air Transportation; Rail Transportation; Truck Transportation; Warehousing and Storage; Postal Service
Paper and derivatives manufacturing	- Avery Dennison Corp. - International Paper Co. - Mercer International, Inc. - Suzano Papel e Celulose SA	Pulp Mills; Paper Mills; Paper Bag and Coated and Treated Paper Manufacturing; Newsprint Mills; Other Paperboard Container Manufacturing
Plastics and rubber products manufacturing	- Bridgestone Corp. - Goodyear Tire and Rubber Co. - HANKOOK TIRE Co., Ltd. - The Yokohama Rubber Co. Ltd.	Tire Manufacturing (except Retreading); Polystyrene Foam Product Manufacturing; Unlaminated Plastics Profile Shape Manufacturing; Plastics Bottle Manufacturing; Plastics Pipe and Pipe Fitting Manufacturing; All Other Plastics Product Manufacturing
Real estate	- Alexandria Real Estate Equities, Inc. - Boston Properties, Inc. - Hospitality Properties Trust - Jones Lang LaSalle, Inc.	Offices of Real Estate Appraisers; Lessors of Nonresidential Buildings (except mini warehouses); Nonresidential Property Managers; Other Activities Related to Real Estate
Rental and leasing services	- AerCap Holdings NV - Air Lease Corp. - Duskin Co., Ltd. - Element Fleet Management Corp.	Office Machinery and Equipment Rental and Leasing; Truck, Utility Trailer, and RV (Recreational Vehicle) Rental and Leasing; Construction, Mining, and Forestry Machinery and Equipment Rental and Leasing; Commercial Air, Rail, and Water Transportation Equipment Rental and Leasing; Other Commercial and Industrial Machinery and Equipment
Transportation equipment manufacturing (motor vehicles)*	- Fiat Chrysler Automobiles NV - General Motors Co. - Honda Motor Co., Ltd. - Nissan Motor Co., Ltd. - Renault South Africa	Automobile Manufacturing; Motor Vehicle Electrical and Electronic Equipment Manufacturing; Motor Vehicle Body Manufacturing; Motor Vehicle Seating and Interior Trim Manufacturing; Other Motor Vehicle Parts Manufacturing

The companies listed in this appendix are included for the purposes of example only; they **DO NOT** in any way reflect past or current clients of Integration or indicate any partnerships, affiliations or other association.



2. CONSULT TO DRIVE INNOVATION

EXAMPLE INDUSTRIES AND SECTORS CLASSIFICATION	EXAMPLE COMPANIES	TYPE
Computer and electronic product manufacturing	- Acer, Inc. - Hewlett-Packard Enterprise Co. - Lenovo Group Ltd. - Logitech International SA - Micro-Star International Co., Ltd. - Seiko Epson Corp.	Audio and Video Equipment Manufacturing; Bare Printed Circuit Board Manufacturing; Capacitor, Resistor, Coil, Transformer, and Other Inductor Manufacturing; Electronic Computer Manufacturing; Electromedical and Electrotherapeutic Apparatus Manufacturing
Finance and insurance	- Allianz SE - Banco do Brasil SA - Prudential Plc - MetLife, Inc. - Lloyd's Banking Group Plc - Wells Fargo & Co.	Credit Intermediation and Related Activities; Funds, Trusts, and Other Financial Vehicles; Insurance Carriers and Related Activities; Monetary Authorities-Central Bank; Securities, Commodity Contracts, and Other Financial Investments and Related Activities
Machinery manufacturing	- Caterpillar, Inc. - Epiroc AB - Schindler Holding AG - Shanghai Electric Group Co., Ltd. - Siemens Gamesa Renewable Energy SA	Air and Gas Compressor Manufacturing; Air-Conditioning and Warm Air Heating Equipment and Commercial and Industrial Refrigeration Equipment Manufacturing; All Other Miscellaneous General Purpose Machinery Manufacturing; Construction Machinery Manufacturing; Conveyor and Conveying Equipment Manufacturing; Elevator and Moving Stairway Manufacturing; Farm Machinery and Equipment Manufacturing; Fluid Power Cylinder and Actuator Manufacturing
Media and entertainment*	- CBS Corp. - Lionsgate Entertainment Corp. - Twenty-First Century Fox, Inc. - Viacom, Inc.	Broadcasting (except Internet); Radio Networks; Television Broadcasting; Motion Picture and Sound Recording Industries; Publishing Industries (except Internet)
Professional, scientific, and technical services	- FTI Consulting, Inc. - H&R Block, Inc. - Ipsos SA - Nielsen Holdings Plc - Paychex, Inc.	Administrative Management and General Management Consulting Services; Advertising Agencies; Architectural Services; Custom Computer Programming Services; Engineering Services; Environmental Consulting Services; Geophysical Surveying and Mapping Services; Graphic Design Services; Marketing Consulting Services; Marketing Research and Public Opinion Polling; Media Buying Agencies; Offices of Lawyers; Other Computer Related Services; Other Management Consulting Services
Telecommunications	- AT&T, Inc. - Sprint Corp. - Telecom Argentina SA - Vodafone Group Plc	Satellite Telecommunications; Telecommunications Resellers; Wired Telecommunications Carriers; Wireless Telecommunications Carriers (except Satellite)



3. OPTIMAL SERVICE LEVEL

EXAMPLE INDUSTRIES AND SECTORS CLASSIFICATION	EXAMPLE COMPANIES	TYPE
Chemical manufacturing	- Akzo Nobel NV - Monsanto Co. - Nissan Chemical Corp. - PETRONAS Chemicals Group Bhd. - The Dow Chemical Co.	Adhesive Manufacturing; All Other Basic Organic Chemical Manufacturing; Ethyl Alcohol Manufacturing; Paint and Coating Manufacturing; Pesticide and Other Agricultural Chemical Manufacturing; Petrochemical Manufacturing; Resin and Synthetic Rubber Manufacturing
Food manufacturing	- BRF SA - Kellogg Co. - Nestlé SA - Strauss Group Ltd. - The Hershey Co.	Breakfast Cereal Manufacturing; Cane Sugar Manufacturing; Cheese Manufacturing; Chocolate and Confectionery Manufacturing from Cacao Beans; Coffee and Tea Manufacturing; Commercial Bakeries; Confectionery Manufacturing from Purchased Chocolate; Dried and Dehydrated Food Manufacturing; Dry Pasta, Dough, and Flour Mixes Manufacturing from Purchased Flour; Dry, Condensed, and Evaporated Dairy Product Manufacturing; Flavoring Syrup and Concentrate Manufacturing
Heavy and civil engineering construction	- China Energy Engineering Corp. Ltd. - China Nuclear Engineering Corp. Ltd. - EOG Resources, Inc. - Gibson Energy, Inc. - Sinopec Oilfield Service Corp. - Toshiba Plant Systems & Services	Highway, Street, and Bridge Construction; Oil and Gas Pipeline and Related Structures Construction; Other Heavy and Civil Engineering Construction; Power and Communication Line and Related Structures Construction

Primary metal manufacturing	- AK Steel Holding Corp. - China Oriental Group Co. Ltd. - Fujikura Ltd. - Harsco Corp. - Xinjiang Ba Yi Iron & Steel Co., Ltd.	Alumina Refining and Primary Aluminum Production; Aluminum Foundries (except Die-Casting); Aluminum Sheet, Plate, and Foil Manufacturing; Copper Rolling, Drawing, Extruding, and Alloying; Iron and Steel Mills and Ferroalloy Manufacturing; Iron and Steel Pipe and Tube Manufacturing from Purchased Steel; Iron Foundries; Nonferrous Metal (except Aluminum) Smelting and Refining; Nonferrous Metal (except Copper and Aluminum) Rolling, Drawing, and Extruding
Utilities	- Beijing Jingneng Clean Energy Co. - Duke Energy Corp. - Électricité de France SA - Enel Chile SA - Exelon Corp	Electric Power Distribution; Hydroelectric Power Generation; Fossil Fuel Electric Power Generation; Nuclear Electric Power Generation; Wind Electric Power Generation; Natural Gas Distribution; Sewage Treatment Facilities; Water Supply and Irrigation Systems



4. CONVERT & PROTECT

EXAMPLE INDUSTRIES AND SECTORS CLASSIFICATION	EXAMPLE COMPANIES	TYPE
Agriculture, forestry, fishing and hunting	- Bright Dairy & Food Co., Ltd. - Charoen Pokphand Foods Public Co. - Mowi ASA - Orient Group, Inc.	Animal Production and Aquaculture; Crop Production; Fishing, Hunting and Trapping; Support Activities for Agriculture and Forestry
Construction of buildings	- Berkeley Group Holdings Plc - HASEKO Corp. - Shenzhen Bauing Construction Holding Group Co. Ltd.	Commercial and Institutional Building Construction; Industrial Building Construction
Fabricated metal product manufacturing	- SKF AB - Encore Wire Corp. (Delaware) - Beijing Shougang Co., Ltd. - Doosan Heavy Industries & Construction Co., Ltd. - Barnes Group, Inc.	Ball and Roller Bearing Manufacturing; Fabricated Pipe and Pipe Fitting; Fabricated Structural Metal Manufacturing; Fluid Power Valve and Hose Fitting Manufacturing; Hardware Manufacturing; Industrial Valve Manufacturing; Iron and Steel Forging; Metal Can Manufacturing; Metal Coating, Engraving (except Jewelry and Silverware), and Allied Services to Manufacturers; Metal Crown, Closure, and Other Metal Stamping (except Automotive); Metal Tank (Heavy Gauge) Manufacturing; Metal Window and Door Manufacturing; Other Metal Container Manufacturing; Plumbing Fixture Fitting and Trim Manufacturing; Power Boiler and Heat Exchanger Manufacturing; Prefabricated Metal Building and Component Manufacturing
Mining (except oil and gas)	- BHP Group Plc - Eramet SA - Rio Tinto Plc - Vale SA	Metal Ore Mining; Copper, Nickel, Lead, and Zinc Mining; Gold Ore Mining; Silver Ore Mining; Uranium-Radium-Vanadium Ore Mining; Clay and Ceramic and Refractory Minerals Mining
Nonmetallic mineral product manufacturing	- Asia Cement Corp. - LafargeHolcim Ltd. - Owens-Illinois, Inc. - Rockwool International A/S - Titan Cement Co. SA 3M Co.	Abrasive Product Manufacturing; Clay Building Material and Refractories Manufacturing; Cement Manufacturing; Concrete Block and Brick Manufacturing; Concrete Pipe Manufacturing; Glass and Glass Product Manufacturing; Mineral Wool Manufacturing
Oil and gas extraction and transportation*	- BP Plc - Gazprom PJSC - Japan Petroleum Exploration Co., Ltd. - PetroChina Co., Ltd. - Petróleo Brasileiro SA - Royal Dutch Shell Plc	Oil and Gas Extraction; Pipeline Transportation of Crude Oil; Pipeline Transportation of Natural Gas; Pipeline Transportation of Refined Petroleum Products
Petroleum and coal products manufacturing	- Alon USA Partners LP - Esso Thailand Public Co. Ltd. - Exxon Mobil Corp. - Sinopec Shanghai Petrochemical Co. - Shaanxi Heima Coking Co., Ltd.	All Other Petroleum and Coal Products Manufacturing; Petroleum Lubricating Oil and Grease Manufacturing; Petroleum Refineries
Support activities for mining	- Baker Hughes, a GE Co. - Cosmo Energy Holdings Co., Ltd. - Elkem ASA - Halliburton Co - Pingdingshan Tianan Coal Mining Co., Ltd.	Drilling Oil and Gas Wells; Support Activities for Coal Mining; Support Activities for Metal Mining; Support Activities for Oil and Gas Operations

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Transportation equipment manufacturing (except motor vehicles)	▪ CSSC Offshore & Marine Engineering (Group) Co., Ltd. ▪ Elbit Systems Ltd. ▪ Greenbrier Cos., Inc. ▪ Hyundai Heavy Industries Co., Ltd. ▪ RPC Group Plc ▪ Samsung Heavy Industries Co., Ltd.	▪ Ship and Boat Building; Military Armored Vehicle, Tank, and Tank Component Manufacturing; Motorcycle, Bicycle, and Parts Manufacturing; Railroad Rolling Stock Manufacturing; Ship Building and Repairing
Wood product manufacturing	▪ Boise Cascade Co. ▪ Svenska Cellulosa AB ▪ Universal Forest Products, Inc. ▪ West Fraser Timber Co. Ltd.	▪ All Other Miscellaneous Wood Product Manufacturing; Engineered Wood Member (except Truss) Manufacturing; Prefabricated Wood Building Manufacturing; Sawmills; Wood Window and Door Manufacturing



5. INNOVATION OBSESSION

EXAMPLE INDUSTRIES AND SECTORS CLASSIFICATION	EXAMPLE COMPANIES	TYPE
Aerospace products and parts manufacturing	▪ Airbus SE ▪ China Aerospace Times Electronics ▪ Embraer SA ▪ Mitsubishi Heavy Industries, Ltd. ▪ The Boeing Co.	▪ Aircraft Engine and Engine Parts Manufacturing; Aircraft Manufacturing; Guided Missile and Space Vehicle Manufacturing; Guided Missile and Space Vehicle Propulsion Unit and Propulsion Unit Parts Manufacturing; Other Aircraft Parts and Auxiliary Equipment Manufacturing
Electrical equipment manufacturing	▪ Energizer Holdings, Inc. ▪ Fuji Electric Co., Ltd. ▪ Johnson Electric Holdings Ltd. ▪ OSRAM Licht AG ▪ Schneider Electric SE ▪ Siemens Ltd.	▪ Electric Lamp Bulb and Part Manufacturing; Lighting Fixture Manufacturing; Current-Carrying Wiring Device Manufacturing; Fiber Optic Cable Manufacturing; Motor and Generator Manufacturing; Communication and Energy Wire Manufacturing; Power, Distribution, and Specialty Transformer Manufacturing; Primary Battery Manufacturing; Relay and Industrial Control Manufacturing; Storage Battery Manufacturing
Information technology and services*	▪ Adobe, Inc. ▪ Alliance Data Systems Corp. ▪ Microsoft Corp. ▪ Oracle Corp. ▪ PayPal Holdings, Inc. ▪ SAP SE	▪ Data Processing, Hosting, and Related Services; Other Information Services; Internet Publishing and Broadcasting and Web Search Portals; Software Publishers
Medical equipment & supplies manufacturing	▪ Boston Scientific Corp. ▪ Carl Zeiss Meditec AG ▪ Owens & Minor, Inc. ▪ Sirona Dental Systems, Inc. ▪ Smith & Nephew Plc ▪ The Cooper Cos., Inc.	▪ Dental Equipment and Supplies Manufacturing; Ophthalmic Goods Manufacturing; Surgical and Medical Instrument Manufacturing; Surgical Appliance and Supplies Manufacturing
Pharmaceutical and medicine manufacturing	▪ Abbott Laboratories ▪ Bayer AG ▪ Biogen, Inc. ▪ GlaxoSmithKline Plc ▪ Johnson & Johnson	▪ Biological Product (except Diagnostic) Manufacturing; In-Vitro Diagnostic Substance Manufacturing; Medicinal and Botanical Manufacturing; Pharmaceutical Preparation Manufacturing



6. MIGRATE OR BECOME EXPERT

EXAMPLE INDUSTRIES AND SECTORS CLASSIFICATION	EXAMPLE COMPANIES	TYPE
Support activities for logistics operations*	▪ BBA Aviation Plc ▪ Compañía de Distribución Integral Logista Holdings SAU ▪ COSCO SHIPPING Holdings Co. Ltd. ▪ Forward Air Corp. ▪ Hong Kong Aircraft Engineering Co., Ltd.	▪ Traffic Control; Freight Transportation Arrangement; Marine Cargo Handling; Navigational Services to Shipping; Other Airport Operations

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About Integration

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We work side by side with our clients to create customized solutions that match their business needs for change across all levels of the organization – always integrating our expertise with the client's reality. The result of this for our clients is a unifying movement across the organization that creates a positive legacy of tangible change – always integrating people and business.



1995



2005



2006



2008



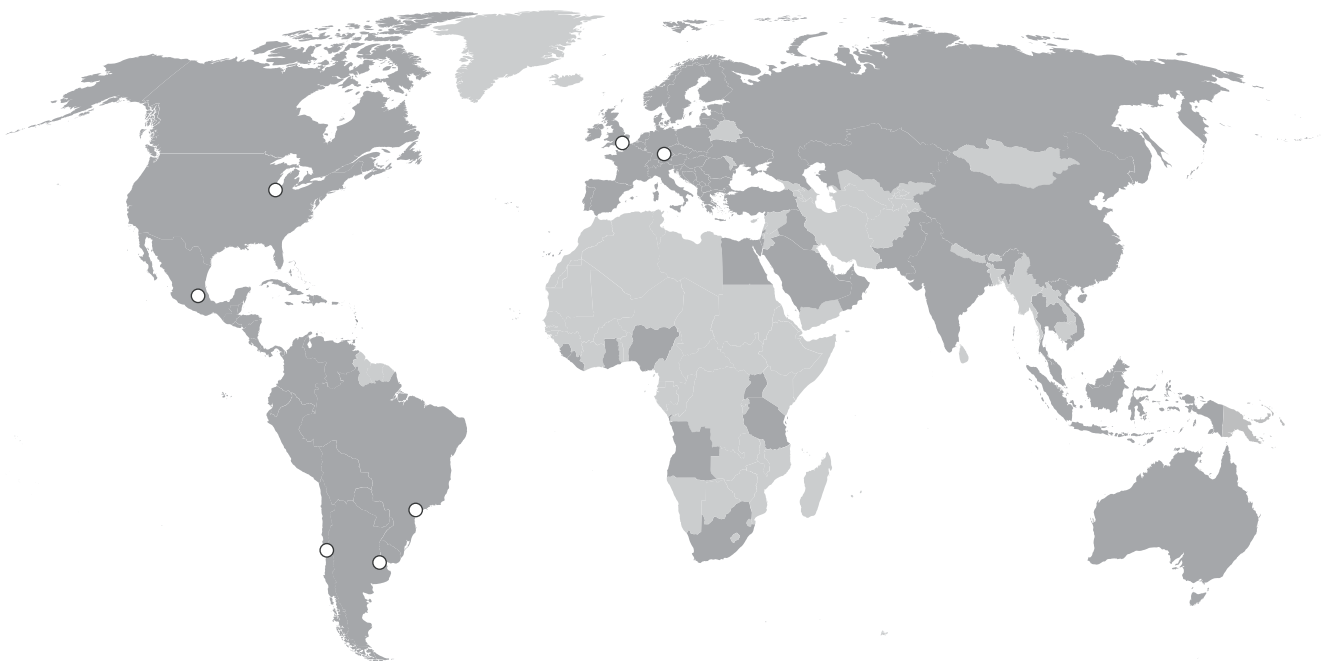
2010



2015



2019



● Countries we've worked in (as of Dec. 2024)

○ Our offices

since
1995

offices

7

clients served

920+

projects delivered

3630+

countries worked in

85+

repurchase rate

87%

What we offer



GROWTH

SUPPLY CHAIN

EFFICIENCY

ORG. DESIGN

M&A

How we offer it

Our differential is an approach based on integrating teams – a transformation that's only possible when working side by side

We believe in strategies that can be implemented

WE'RE PARTNERS IN YOUR TRANSFORMATION

Some of our clients – who are all available for references

We're proud of the recognition received for our work



Best Change Management
Project in the Public Sector



Project of the Year
Best Project, 2017



International Project
Category



Commercial Impact
Category



Top Employers among Medium-Sized Companies from Focus magazine
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TRANSFORMATIONS IN B2B GO-TO-MARKET DESIGN: CONNECTING STRATEGY TO EXECUTION

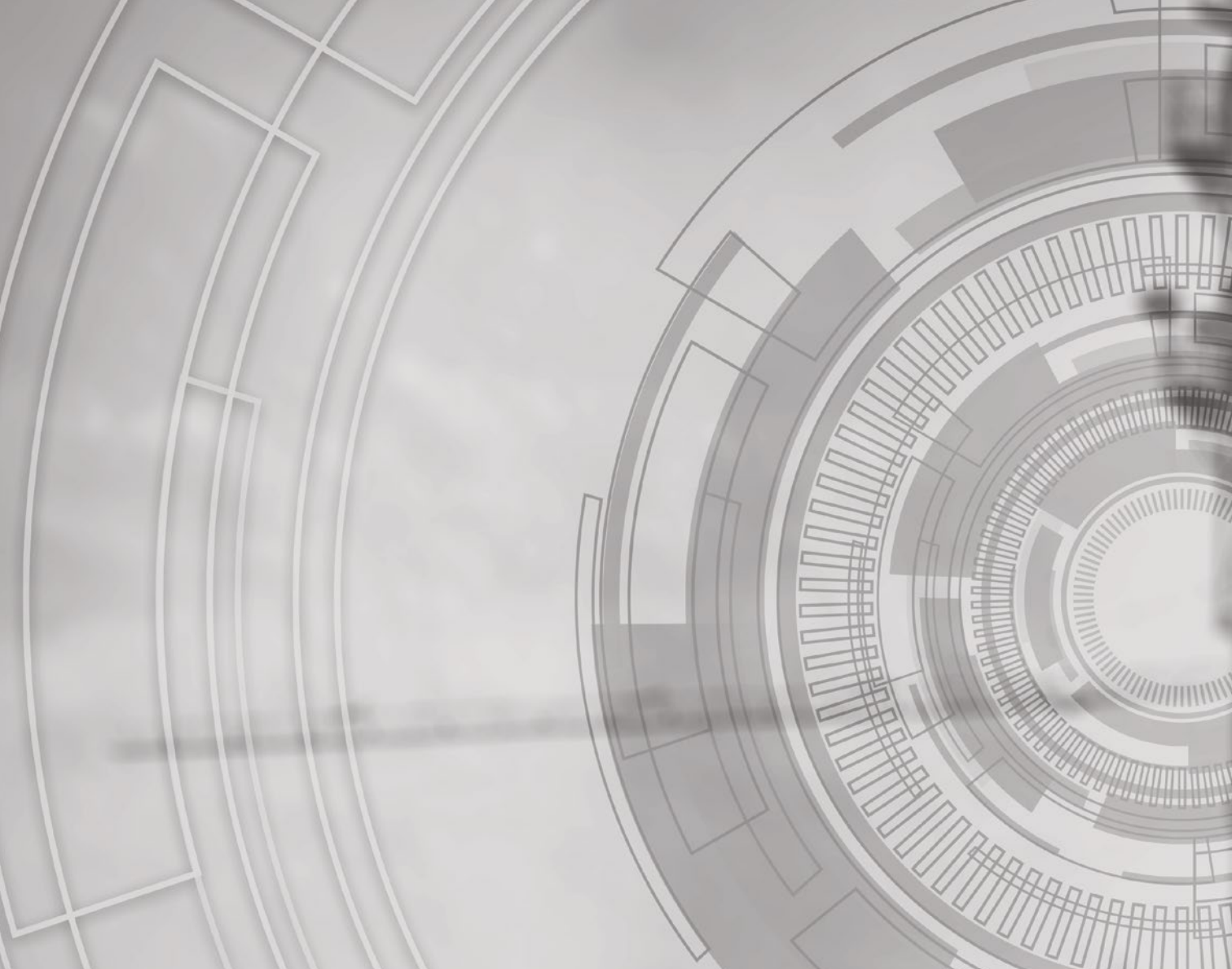
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