

SCALE

Sales pitch deck assessment tool

What it is

A framework for assessing the format and content for your current sales pitch deck to craft a more compelling sales narrative

Who it's for

Sales teams, sales leaders, and any function such as marketing involved in designing, structuring, or delivering a company sales presentation or 'pitch deck'

Why it's important

A formal sales presentation or pitch deck is often the first and most lasting memory of a company's value and differentiation. First impressions can mean "go or no go". Unfortunately most sales presentations fail to engage buyers or help them make better decisions. Instead many organizations/sellers create and deliver presentations that:

- **Focus too early and in too much depth on their product or service**
- **Lack a clear connection to the buyer's specific business, problems, or opportunities**
- **Fail to tell a relatable story and provide a clear call to action**

Further, few regularly evaluate their sales presentations using an objective process

Guiding principles of world class sales presentations



Lead with the problem

Name the big shift taking place or the problem in the market that leads to your solution vs. vs. your company, logos and solution



Sell a point-of-view or approach

Focus on a point-of-view and approaches to solving the problem before getting into your solution



Share stories

Rely upon stories, analogies and examples vs. claims and facts to increase buy-in, believability and emotional connection



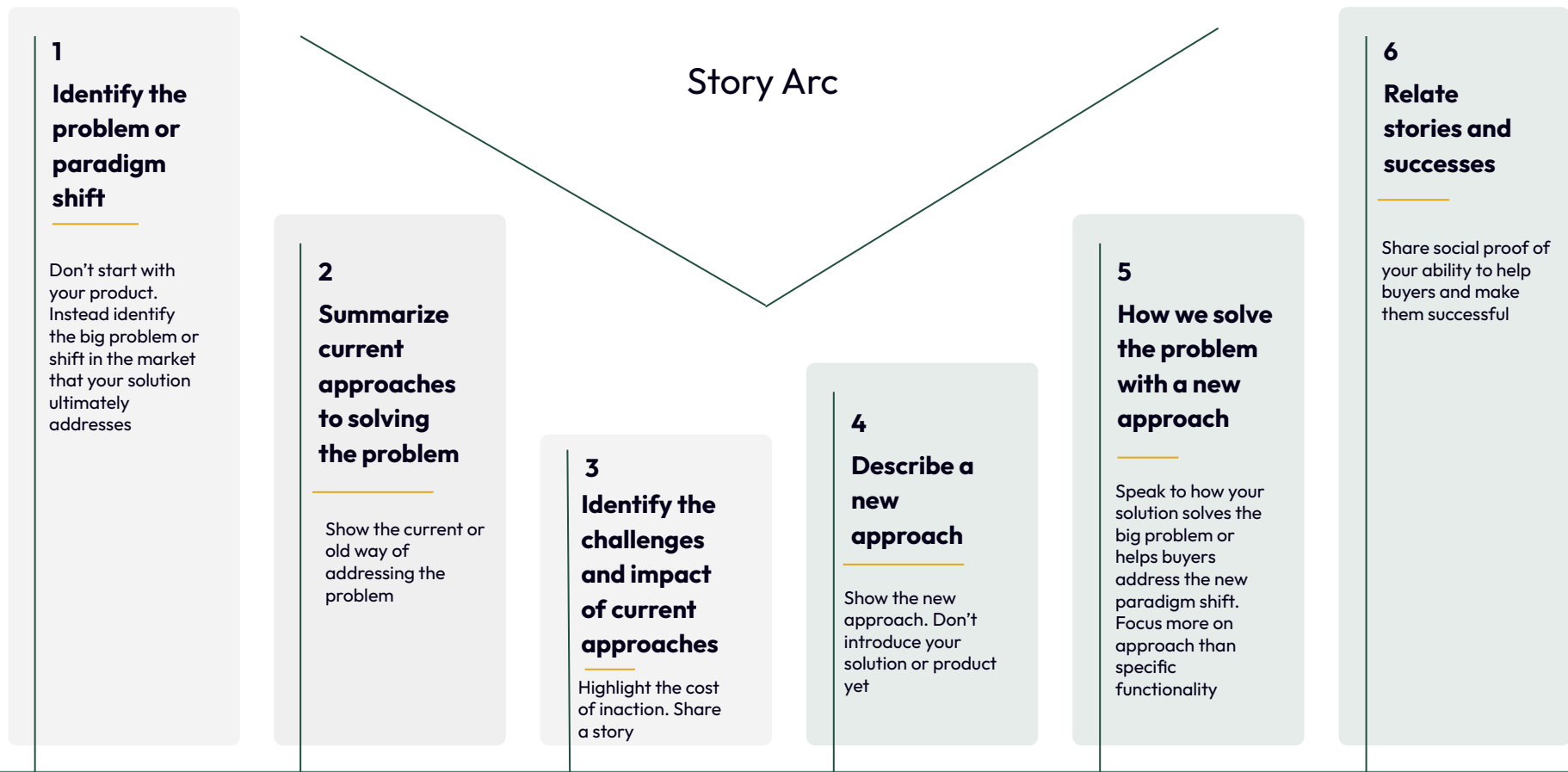
Focus on the Cost of Inaction

Show both the ideal state that can be achieved as well as the cost of doing nothing

Buyer-centric

Start with what the buyer cares about — their goals, challenges and opportunities, not your company and products

Scale GTM Roadmap for effective pitch decks



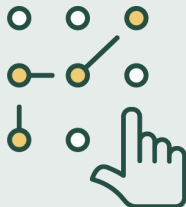
Call to action: Assess and optimize your sales pitch deck

Leverage a Scale GTM advisor



The Scale GTM team can conduct a quick assessment of your sales pitch deck and advise you on sales presentation development, delivery, and/or training.

Do it yourself

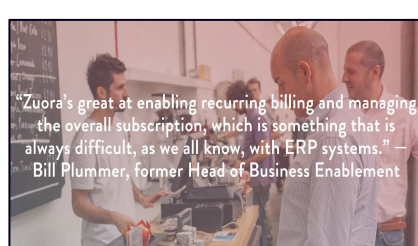
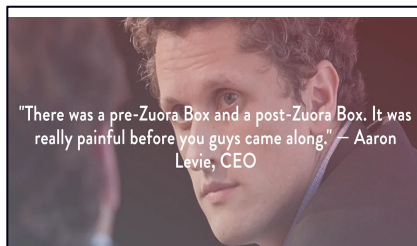
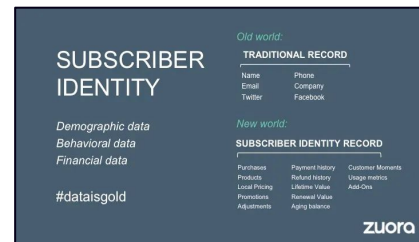
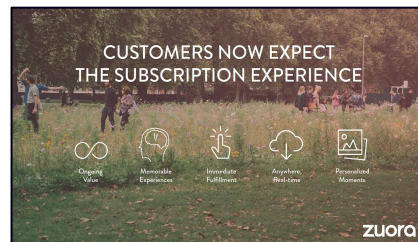
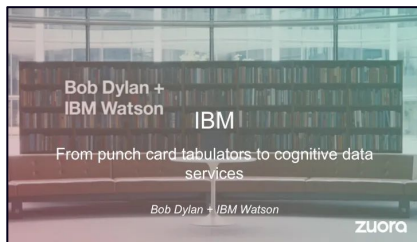
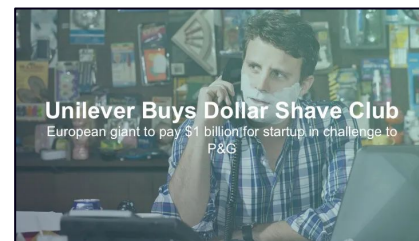
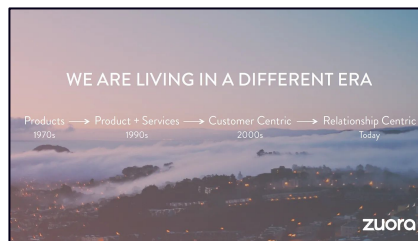
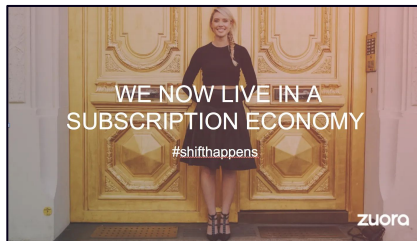


Use this framework and the example decks provided to evaluate, revise and improve your sales pitch deck on your own.


Examples



Zuora ([link](#))




Pocus (link)



TURN PRODUCT DATA INTO REVENUE

SHIFT TO PRODUCT-LED SALES

The way we buy and sell has changed



OLD SCHOOL SALES

PRODUCT-LED SALES


What is Product-Led Sales (PLS)?

A go-to-market approach that relies on existing users of the product to drive revenue, including conversion, upsell, cross-sell and expansion.




Users are grateful. Sales reps' lives are made easier.


Product-Led Sales (PLS) is the future of SaaS



Buyers Prefer PLS
The customer may not buy, but it's a warmer lead than cold outreach.



Sellers Prefer PLS
Hard to compete when already inside your funnel.




Execs Prefer PLS
Incrementally lower CAC and faster growth.

PLS is uncovering millions in new revenue opportunities for PLS sales teams.

In PLS, users interact with the product before talking to a human.

So valuable usage data ends up in the data warehouse where it's out of reach for sales.



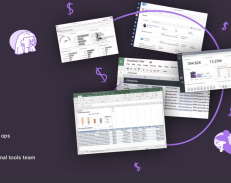
So, we built Pocus

Platform purpose-built for Product-Led Sales.

- SINGLE SOURCE OF TRUTH**
Unify your data and customers are all in one place they interact with the product.
- INSIGHT TO ACTION**
Surface the best opportunities and take the optimal action.
- NO-CODE INTERFACE**
Allow non-technical people to control their CRM relations.


- + Less time digging through data.**
More time spent with customers.
- + Save reps hours per week**
No more stitching together data between tools.
- + Surface new revenue opportunities**
Proactively surface the highest priority leads to your reps.
- + Accelerate PQL adoption**
No-code tools for Ops and intuitive UI for sales.
- + No-code tools that put Ops in control**
Build intelligent dashboards, scoring, and workflows.

The real cost of build vs. buy




How does it work?

Pocus puts go-to-market teams in the driver's seat with a few simple steps




CONNECT

Point Pocus at your data sources central or at the hard work. We'll combine product and CRM data into a single view.




CONFIGURE

Configure the PLS playbooks your team will run. Choose from popular playbooks like free to paid conversion, expansion, or add new data to uncover more.



PRIORITIZE

Equip your team with a prioritized list of users and accounts based on the Playbooks they are running. Get insights at a glance or drill into data to uncover more.



ACTION

Know exactly what action to take next. Alert your team when a human touch is required via Slack or email into a marketing sequence. All without leaving your workflow.

HOW CUSTOMERS USE POCUS

Save hours of ops teams time

Pocus enables us to create hypotheses for PQLs and quickly operationalize. This was huge for me as I stood up the SaaS business. I would not have been able to do this without Pocus.

We created extremely Build & intelligent scoring models without hours of coding or writing SQL queries.

I've been on an engineering backlog for months trying to build the scoring model. I'm canceling my request on the backlog after seeing Pocus.

HOW CUSTOMERS USE POCUS

Uncover millions in new revenue opportunities

I used Pocus in my meeting with [big enterprise account] and was able to sell 20 seats instead of 5 by showing the buyer their usage.

Pocus provides sales reps with the means to ACT on data. The most robust Mode dashboard will always pale in comparison to Pocus, since in sales actions trump all else.

With Pocus, it's easy to know data about hand-overs like how many users this company has, where they are in the journey, who this person is, quickly and without needing to go digging for the data.

Thank you!

GET STARTED WWW.POCUS.COM

Chart Mogul ([link](#))

ChartMogul

Subscription Analytics Platform

Problem

Accurately calculating SaaS metrics is hard.

Harnessing subscription data to inform decisions that lead to faster growth is even harder.

The Old Way

Traditional BI/Data stack



...or spreadsheets

- Requires expert knowledge of how to analyze subscription revenue.
- Complex, costly, and time intensive to build.
- Requires ongoing maintenance from engineers and data team.
- Never real-time.
- Only a few skilled team members are able to run their own analyses.
- Hidden costs related to people-hours and distraction from core operations.

The New Way



ChartMogul

- Quick and easy to setup.
- Built-in best practices from industry experts on how to measure a SaaS business.
- Updates in real-time.
- Empowers non-technical staff to make daily, data-informed decisions.
- Attain perfect accuracy in less time with subscription data cleaning tools.
- Frees up data team to focus on data science unique to core business.
- Push reliable revenue data to other tools on demand.

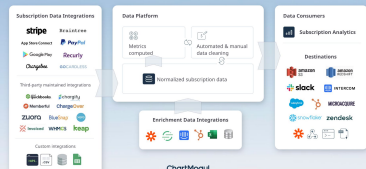
Solution

Introducing: Subscription Analytics Platform

SaaS businesses at scale need a trusted platform that works alongside their data stack.

A strong command of subscription data can make the difference between getting to \$10M ARR in a couple of years vs. a couple of decades.

ChartMogul Subscription Analytics Platform



Why ChartMogul?



Automate the reporting of key subscription metrics
Despite custom analysis of revenue data with custom attributes.



Grow recurring revenue faster
Build, save, and share charts and customer lists specific to the business.



Perfect accuracy with data cleaning tools
Merge, clean up, and manipulate your data in ways that give you new insight.



Trusted subscription analytics experts
Stumped by cohort questions? Send them our way - it's our specialty.

Our Approach

The same invoices you send your customers

ChartMogul uses real-time event and invoice data to model your SaaS metrics.

Our subscription data platform listens for webhooks from your billing system to bring in all relevant data down to each and every transaction.

The Lifecycle of a Subscriber

Subscription Lifecycle



The Data Platform Advantage

“
ChartMogul is absolutely worth the cost we've invested five to ten times over.”

Tyson Quick CEO at Instagage



Thank you.

Contact us
sales@chartmogul.com
<http://www.chartmogul.com>