

# VALUE STORYTELLING DEAL SUPPORT

Articulate your Inspired Value Story, Accelerate Your Revenue

[geniusdrive.com](https://geniusdrive.com)



# SUPPORT YOUR FIELD TEAMS WITH EXPERT VALUE SUPPORT

Our deal support services are designed to accelerate your team's effectiveness, making every customer engagement more strategic and value focused. By focusing on the challenges you can solve and the impact you can have for your customers, we help you build trust and close deals faster. Let's partner to deliver value-based storytelling to every customer interaction.

## WHAT IS VALUE STORYTELLING DEAL SUPPORT?

Your team has crafted a compelling value story and is starting to weave it into the customer journey. Yet, as these skills are freshly acquired and the stakes are high, additional support is required. Our value storytelling deal support is designed to provide that essential backup, helping your team not only reinforce their value articulation skills but also to ensure they deliver standout value propositions when it matters most.



### VALUE COACHING

Mastering new skills requires time, dedication, and the right support structure. This is precisely what our Value Coaching services aim to provide, enhancing the storytelling prowess of your customer-facing teams.

Designed for on-demand delivery, these tactical coaching sessions empower your Account Executives, Sales Engineers, and Customer Success Managers to communicate value with confidence.



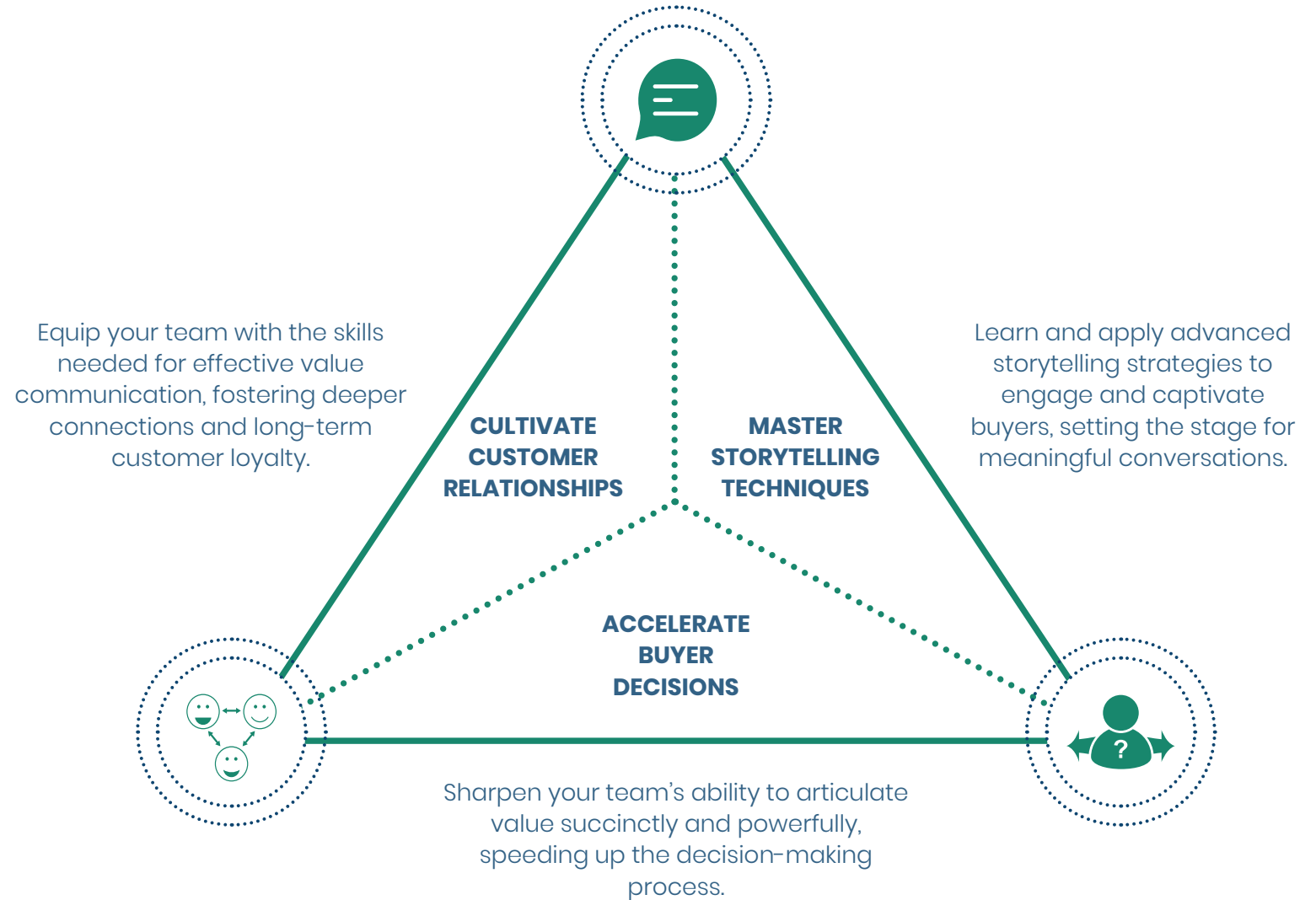
### STRATEGIC DEAL SUPPORT: BUSINESS CASE SERVICES

Craft a CFO-ready business case in collaboration with your key customers, underpinned by solid value justification. The difference between securing a strategic deal and the risk of it diminishing often lies in the strength of your business case. At Genius Drive, we specialize in offering thorough services designed to assist companies in developing persuasive value justification business cases, ensuring your proposals stand out and drive decision-making.

# VALUE COACHING FOR CUSTOMER ENGAGEMENT TEAMS

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# STRATEGIC DEAL SUPPORT: BUSINESS CASE SERVICES

## ENGAGEMENT MODEL

We begin by pinpointing your organization's highest-priority target accounts. This focuses our efforts where they can deliver the highest impact, aligning our resources with your strategic objectives.



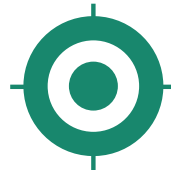
### STRATEGIC ACCOUNT EVALUATION

### COMPREHENSIVE REVIEW PROCESS



We gather and review your team's existing discovery materials and account information to build a framework for the business case. We identify their current understanding of the value story and leverage it as a springboard for deeper insights.

We collaboratively identify any gaps in customer understanding and strategize with your account team on the best approaches to collect necessary data and secure stakeholder support. This ensures that all subsequent actions are informed and purposeful.



### TARGETED PLANNING

Utilizing the gathered knowledge and addressing any identified gaps, we craft an initial draft of the business case. We focus on articulating and quantifying value for a compelling value proposition.



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## DRAFT DEVELOPMENT

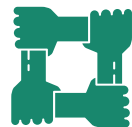
## COLLABORATIVE CUSTOMIZATION

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With the initial draft in hand, we actively seek and incorporate customer feedback, refining the business case into a document that reflects a shared vision of value justification. This iterative process ensures the final product is tailored to the customer's needs and expectations.

Finally, we stand ready to support your account team in presenting the business case to the customer. Whether through coaching, preparation of presentation materials, or direct support during the delivery, our goal is to ensure your team is fully equipped to make a compelling case for your solution.

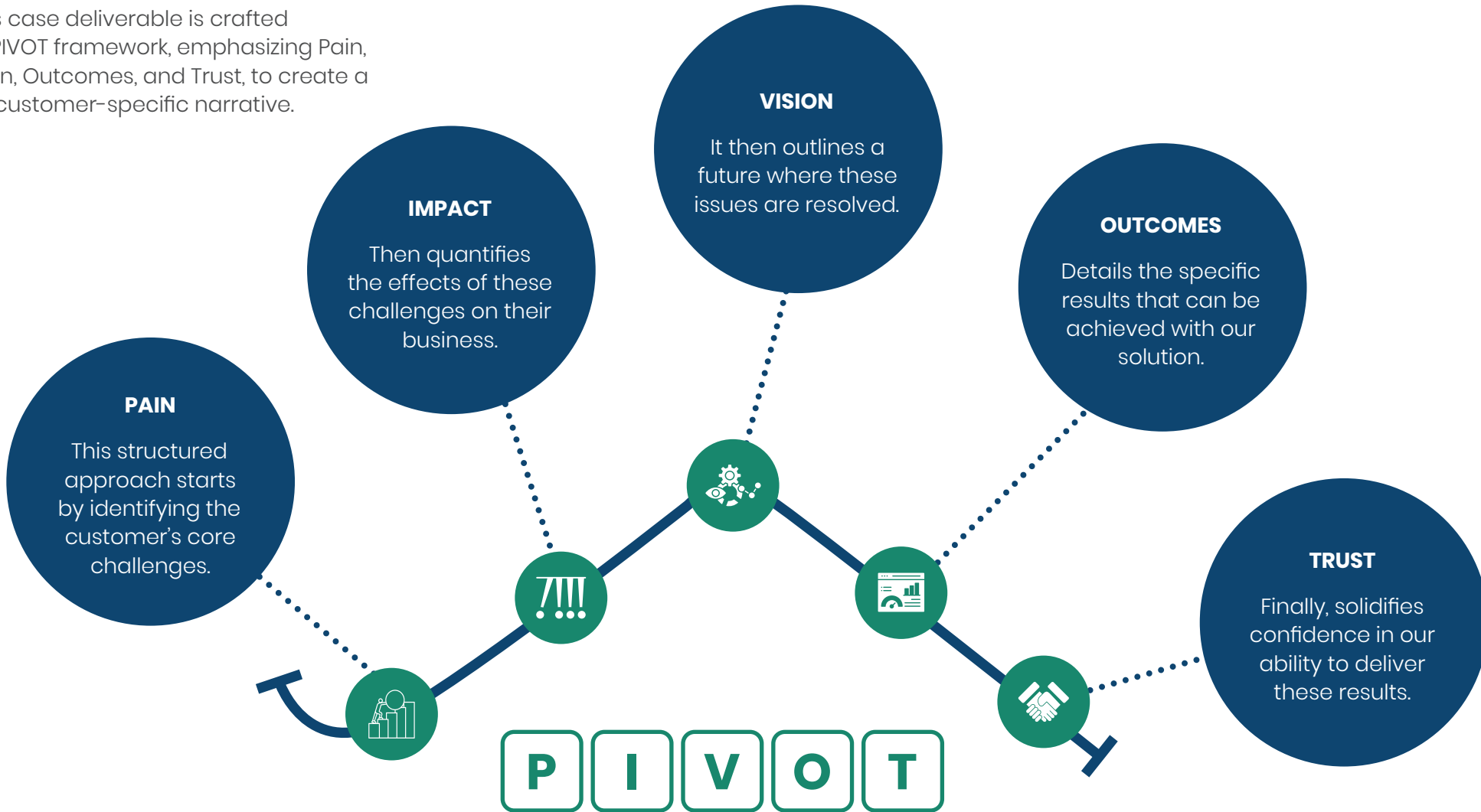


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## SUPPORTIVE DELIVERY

# DELIVERABLES

Our business case deliverable is crafted around the PIVOT framework, emphasizing Pain, Impact, Vision, Outcomes, and Trust, to create a compelling, customer-specific narrative.



Incorporated within this framework is a bespoke value model that quantifies the benefits of your solution in the context of the customer's specific environment. This model lays out the,

**FINANCIAL AND OPERATIONAL ADVANTAGES**

**PROVIDING A CLEAR EVIDENCE-BASED JUSTIFICATION FOR THE INVESTMENT**

### Current Processes

With current manual data collection, workflow and processes, there are many steps, a lot of manual processes, and significant business challenges as a result

MAJOR STEPS	CURRENT PROCESS
Gather related information from various sources	Access portals or communicate back and forth via email, Excel & Word-based data transfer
Prepare workpapers around specific risks & prepare tax returns	Manually input data into Excel & tax software duplicating work & introducing errors
Make final determinations & sign off	Manual sign-off & no standardization making decisions cumbersome and difficult

**15 Steps, 100% manual process**

### Your Savings & Benefits

With K1x, the collection, analysis, production and filing of K-1s and Form 990s can be automated helping to reduce workload, reduce compliance risks and improve investor experiences.

**\$617,982** Total annual savings and benefits  
**\$160.68** Total annual savings & benefits per K-1

Efficiency Improvements	Annual Savings and Benefits
Collect	\$10,734
Analyze	\$384,030
Homepage system avoidance	\$26,038
<b>Risk Avoidance</b>	
Staff retention benefits	\$6,656
Compliance risk avoidance	\$201,258
<b>Improved Investor Experience</b>	
Better investor relations	\$0

### Collect Benefit

K1x and its partners automate portal access and data collection, proactively gathering necessary information, updates and assuring key data is not overlooked or missed.

K1x Collect can help eliminate 60% of the workload from the collect process, especially streamlining access, determinations and updates. This can help save up to 12 minutes per each portal access, helping to save a cumulative 1.2 person hours per portal per year.

<b>\$17,890</b> Current annual Collect costs	<b>\$10,734</b> Productivity benefits of K1x	<b>168</b> Person hour savings with K1x
Number of portals from which K-1 data is collected	186	
Total annual current person hours	280	
Productivity improvement from K1x	60%	

By integrating the PIVOT framework with a tailored value model, we offer a business case uniquely aligned with the customer's needs and challenges. This not only demonstrates a deep understanding of their situation but also provides a robust, data-backed rationale for the strategic value of our solution. Designed to resonate with decision-makers, this business case is a powerful tool for building consensus, fostering trust, and facilitating the closure of strategic deals.

## EXPERT GUIDANCE THROUGH EVERY STEP

The journey to a compelling business case is a collaborative one. Our team of experts works closely with your sales and strategy teams to:



### GATHER INSIGHTS

Conduct in-depth analysis and discovery to understand the client's business drivers, challenges, and objectives.



### STRATEGIC ALIGNMENT

Ensure that the business case aligns with both the client's strategic goals and your solution's unique value propositions, creating a seamless bridge between client needs and your offerings.



### CRAFTING AND REFINEMENT

Develop a draft of the business case, followed by iterative refinement sessions to hone the message and ensure the strongest possible impact.

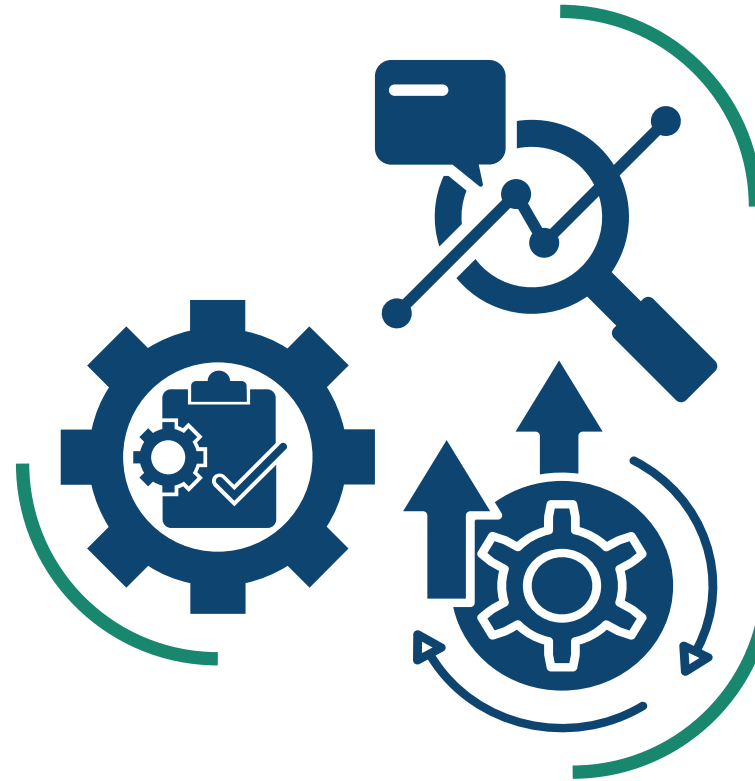


# BENEFITS OF THE INSPIRED VALUE STORYTELLING FRAMEWORK

Our business case deliverable is crafted around the PIVOT framework, emphasizing Pain, Impact, Vision, Outcomes, and Trust, to create a compelling, customer-specific narrative.

## CUSTOMIZED VALUE JUSTIFICATION

Our value business case services go beyond generic propositions by deeply understanding each customer's unique challenges and objectives. This personalized approach ensures that every business case is directly relevant to the needs and priorities of the customer, improving the effectiveness of the delivery.



## QUANTIFIABLE IMPACT ANALYSIS

We quantify the tangible benefits your solution brings to the customer, from cost savings and efficiency gains to revenue growth and risk reductions. This quantified approach not only strengthens the business case but also provides clear, compelling reasons for decision-makers to choose your solution.

## TRUST AND CREDIBILITY ENHANCEMENT

By delivering a comprehensive, well-researched business case that aligns with the customer's goals and challenges, our services build trust and credibility with key stakeholders. Demonstrating a deep understanding of their business and providing evidence-based outcomes drives confidence in your solution, paving the way for successful deal closures.



Leveraging the value expertise from Genius Drive, we were able to quickly revamp our go-to-market approach on differentiating value, generating new opportunities, better motivating customer buying journeys and credibly justifying client's purchase decisions. For us, Genius Drive translated directly into a stronger competitive advantage and accelerated revenue growth.

– **Craig Nelson,**  
Vice President – Sales & Marketing, Triptych

Partnering with Genius Drive transformed the way we communicate our differentiating value to our customers. The Genius Drive team doesn't just provide a service; they take the journey with you, revealing your true value and reshaping your narrative in a compelling and persuasive way. I can confidently say, if you're looking to enhance your value proposition and inspire customer engagement, Genius Drive is your go-to partner.

– **Sherri Sklar,**  
Chief Revenue Officer, Plastic Bank

Genius Drive helped us codify and clarify our value messaging for each target persona and significantly refine our security ROI and capability / maturity models, empowering our team to better articulate our unique value, accelerate buying decisions and improve win rates.

– **James Wilde,**  
Global Head of Security Strategy, SPHERE Technology Solutions

# YOUR PARTNERS IN INSPIRED VALUE STORYTELLING



**THOMAS PISELLO**  
THE ROI GUY, PARTNER

Tom brings over thirty years of pioneering value storytelling and quantification experience. He is better known as “The ROI Guy”.

He is the former Founder and CEO of Alinean (Mediafly) and Interpose (Gartner) and has launched and advised startup technology firms, Full Armor and Connotate Technology.

He is the creator of “Evolved Selling Institute” and author of two bestselling books, “Evolved Selling” and “Frugalnomics”, as well as the self-help book: Growth through Grief.



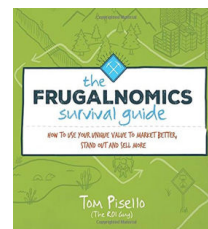
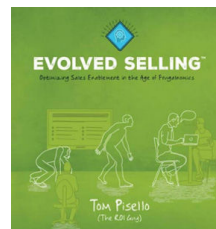
**APRIL MORLEY**  
PARTNER

April brings fifteen years experience in sales and launching, scaling and leading global value and strategy teams in the B2B software industry.

She led the value program at Alteryx for the last five years, driving both full-service value consulting services and self-service support for the field teams.

Her teams influenced over \$300M in revenue annually and led to 2–3x deal size increases and 20+ percentage points increase in win rates.

She holds a Bachelors degree in Marketing from the University of Florida and an MBA from Duke University.



Elevate your customer connections and drive revenue by defining your unique value story. Contact Us to Begin your Journey of Inspired Value Storytelling