



Sales Engagement

Founding partners Frank Albi and Scott Goemmel have a combined 65+ years' experience in the IT Channel. We have owned, grown and profitably exited businesses in this industry – driving best in class results and valuations. In that time, we have interacted with thousands of business partners and served and chaired numerous industry boards. A&G is now a niche group of experienced IT Channel executives who have chosen to invest their time in helping our peers in the industry. The team is comprised of past CEOs, Officers, Senior Sales and Service Executives, as well as CFO resources who provide expertise and experienced advice to clients in all areas of the business.

A&G was established to help partners learn “*The How*” in effectively building and growing sustainable business value. Frank, Scott, and all other team members share common values and a passion for our client’s success. Through our proven methodology and suite of proprietary tools, we accomplish driving revenue, increasing profitability, and ultimately increasing business valuation. All of our programs are designed *to teach and hold our clients accountable to results*.

Today, the impact of subscription and annuity models represents a significant change in the underlying economic drivers in the industry. Drivers that most have relied upon since their inception. A&G is in the unique position of working with 100’s of Channel Partners each year, while also reviewing several hundred financials on behalf of investment bankers and private equity investors. Our observations remain constant – the majority of the channel has not optimized their business model and are now faced with a need to both optimize and *Pivot* to an increasing annuity model. The A&G methodology and tools are designed to quickly identify and teach partners **how** to address the critical areas of their business required to achieve the success each owner desires.

A&G Methodology

We teach our clients to achieve sustainable and profitable growth by helping them gain clarity as to the ownership’s required outcome and then define the focus and execution plan needed to achieve their goals. When engaged with clients 1-on-1, we work together to analyze and address every facet of their business, helping them with the discipline and accountability needed to *Pivot* with these critical industry changes.





Sales Engagement Approach

Leveraging our suite of proprietary tools, we approach a sales-specific engagement first from the perspective of ownership and then through a deep analysis of many areas. Below is an outline of our overall approach, which is customized for each client engagement.

1. Ownership Outcome – determine the desired path and timelines ownership expects including, growth, lifestyle, and the financial expectations in terms of growth, mix, blended gross profit performance, and net income
2. Vision and Value Proposition – understand and/or assist in developing the overall company Vision as well as a clearly defined Unique Value Proposition
3. Who Are You Today – define “who” the company is today through a variety of our tools, including:
 - a. Top 25/100 customer analysis
 - b. Iron Cross – where our offerings make the most margins
 - c. Account Manager historical performance
 - d. Current territory performance
4. Addressable Market – define the markets we plan to target, determine market size and its ability to support the growth plans. Align and verify with OEM market plans, the competitive landscape, and the overall market trends.
5. Foundational Strategy – align the service strategy, target market, and sales strategy together. Evaluate the required market share, type of sales and pre-sales talent required. Define the required sales process, model the future state of the sales team and structure (leadership, headcount, territories, quota’s, and resource alignment), and define compensation plan.
6. Recruiting and Onboarding – finalize job descriptions, screening/interview process, and onboarding plan (30/60/90/180 model).
7. Sale Best Practices – Define the appropriate activity goals, tracking, account plans, ongoing training, meetings, and other key performance indicators as needed by the business model.
8. Sales Playbook – Finalize the overall sales playbook that encompasses all of the above work into an actionable model for all new and existing sales team members.

Common Client Results

A&G chooses our clients based on our assessment of the owner’s ability and desire to transform the business. Depending on the current state of the sales strategy, resource quality, and management systems, the timeline to success varies. When engaged, we often experience at least 25-50% margin growth, 100%+ earning growth, and 100%+ valuation growth within 12-24 months.

For more information, please visit our website at www.agadvising.com or contact either frank@agadvising.com or scott@agadvising.com.