

PRECISION SELLING

Mastering the “Bowtie” Model

Jim Hopkins & Jim Weber



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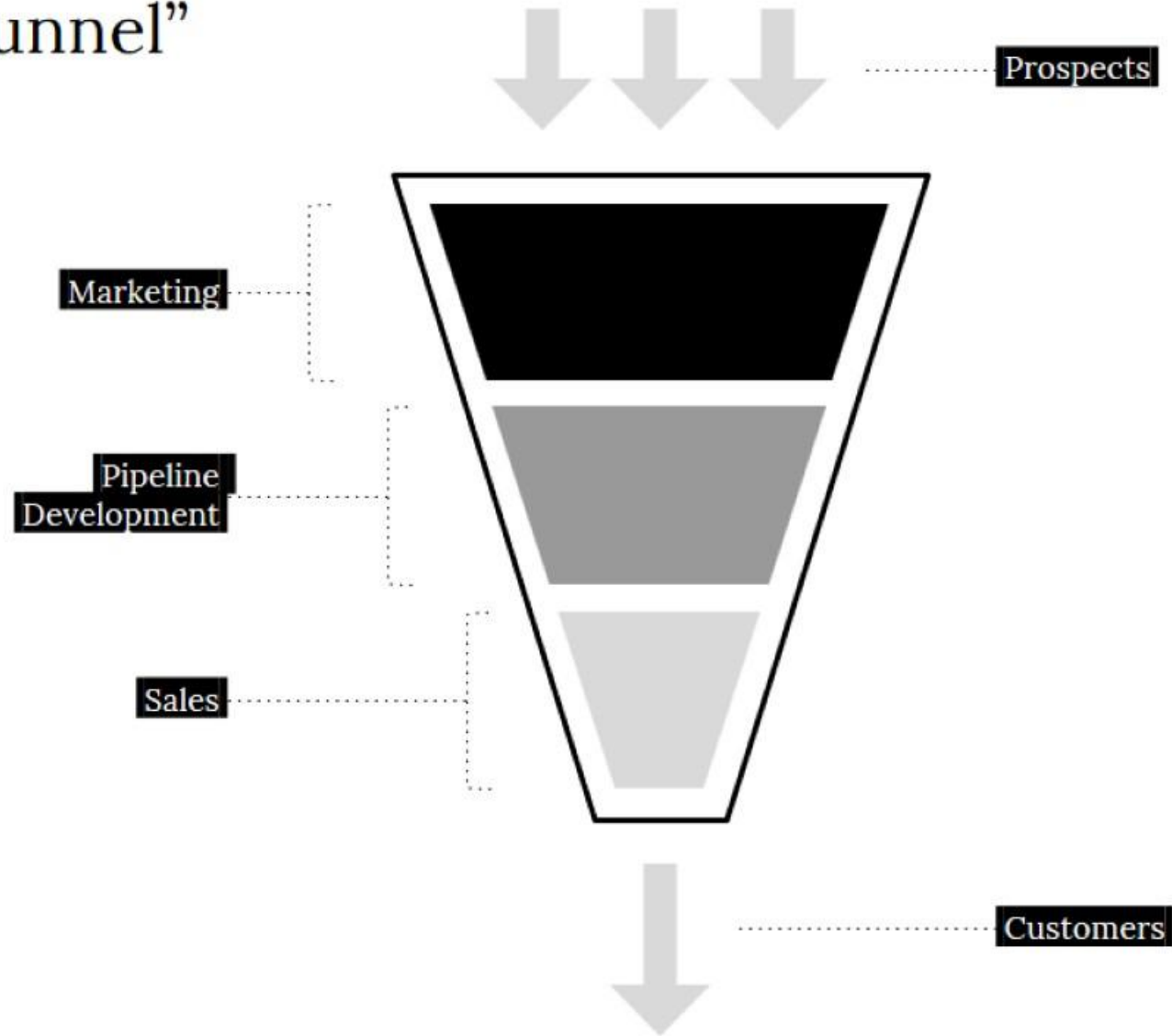
SEPT. 30, 2025

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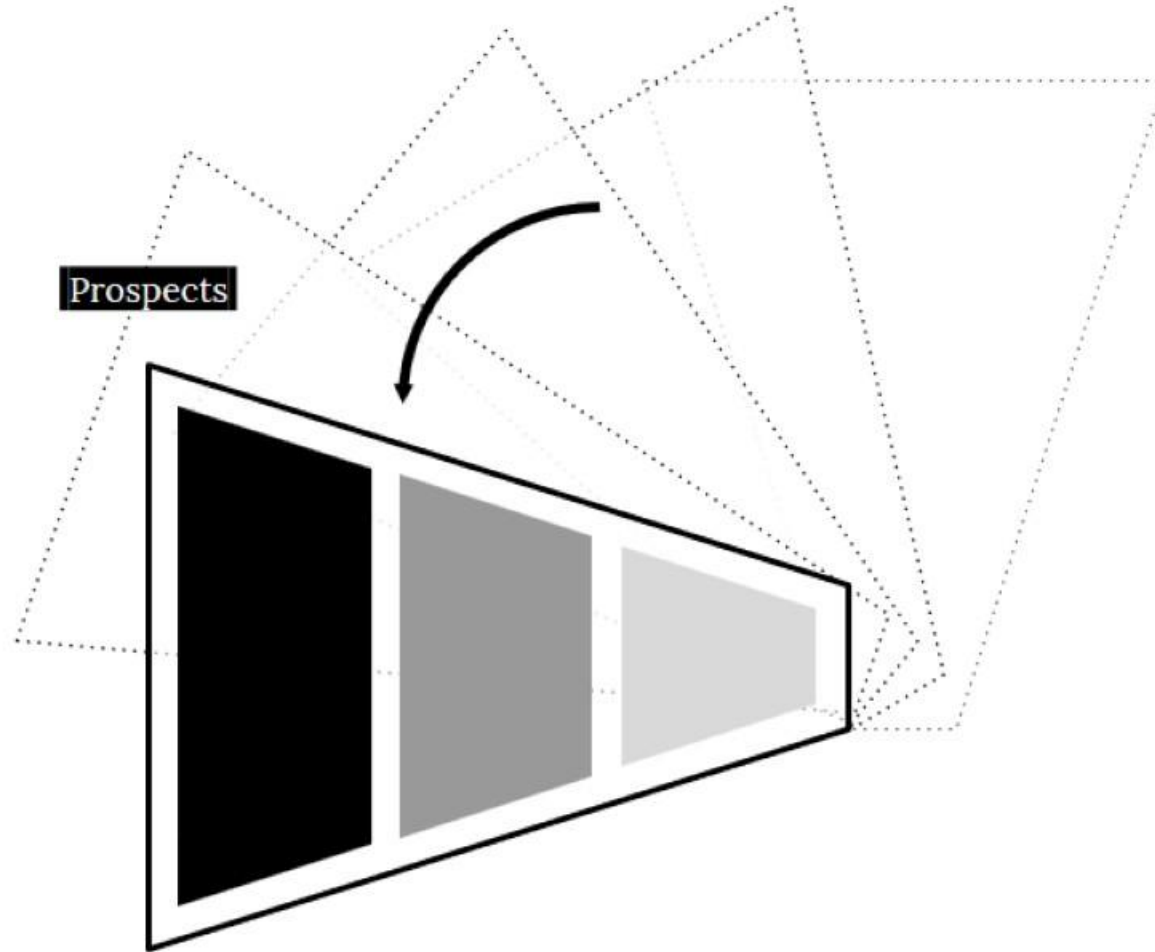
**Old School
methods are
in need of
an upgrade**



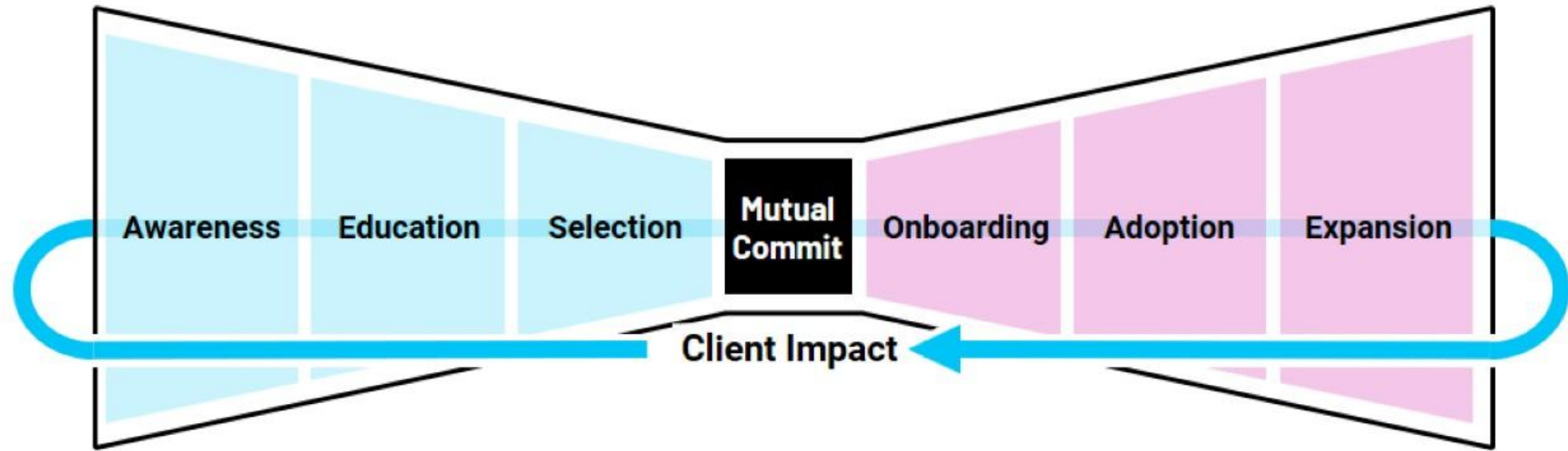
The Classic “Funnel”



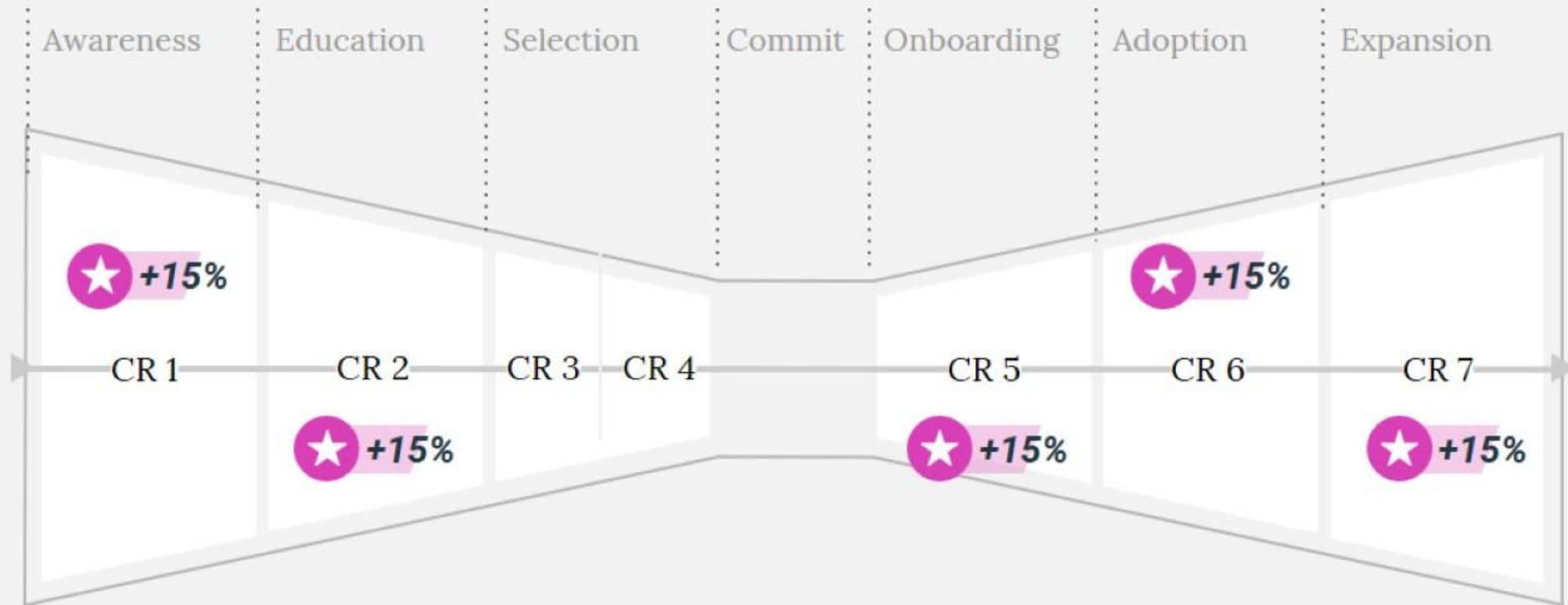
Recurring revenue businesses require a different model



The “Bowtie”



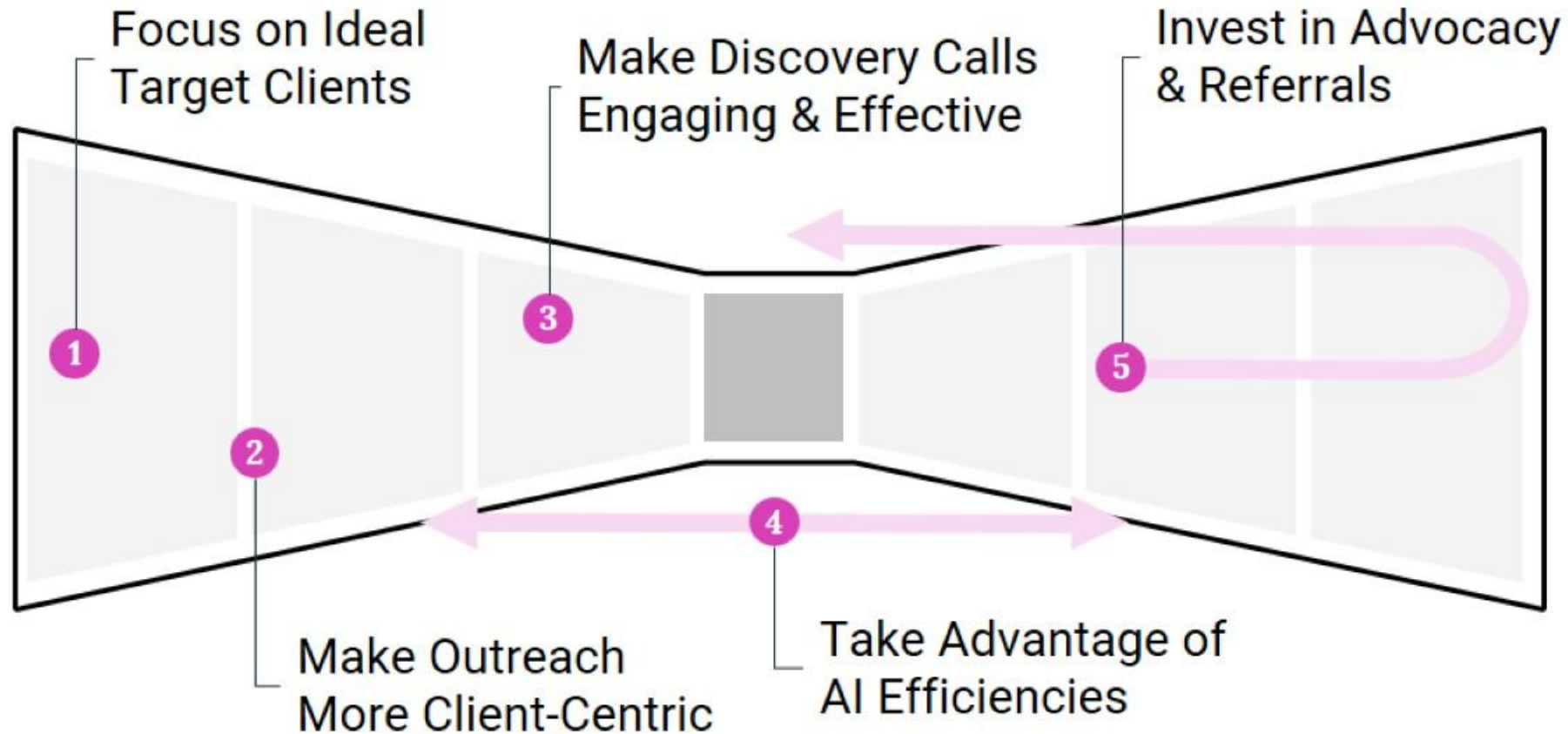
Incremental improvements compound for significant results



 **15% improvement in 5 key moments = 2x revenue** (The math: $1.15^5 = 2x$)

Example. Improve CR1 from 20% to 23% (a 15% improvement over the baseline)

5 Precision Selling Methods



Precision Selling Method #1

Focus on Ideal Target Clients

ICP (Ideal Customer Profile) **noun**

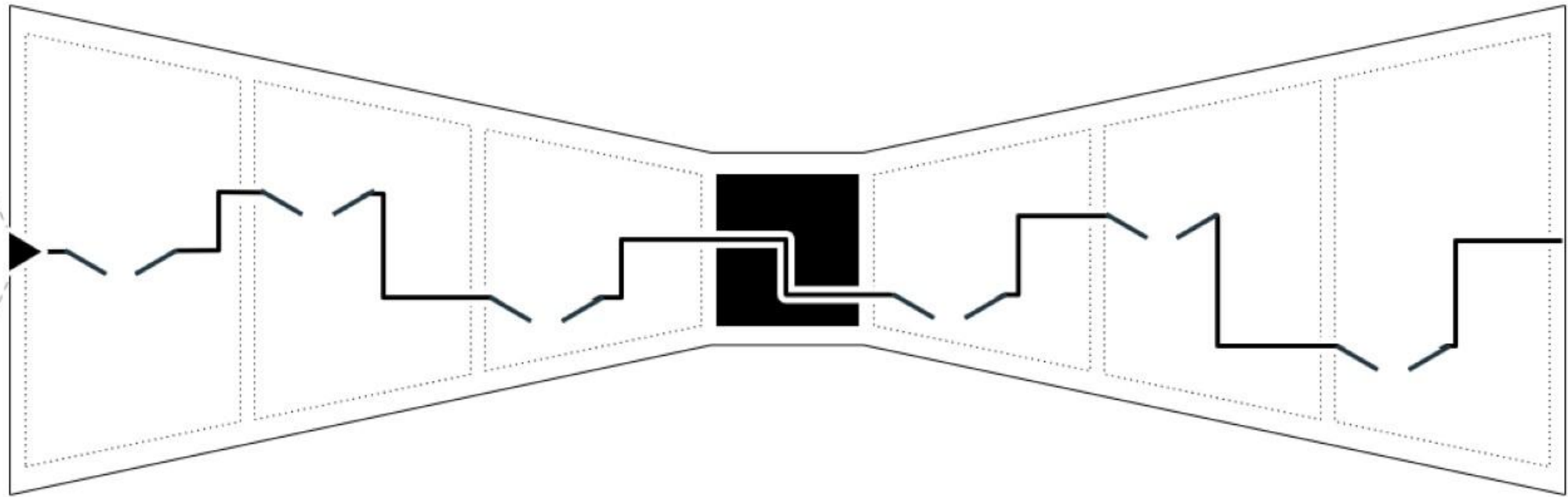
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A clear and actionable mix of attributes describing the target buyers (accounts and/or people) that are most likely to become lasting, profitable customers.

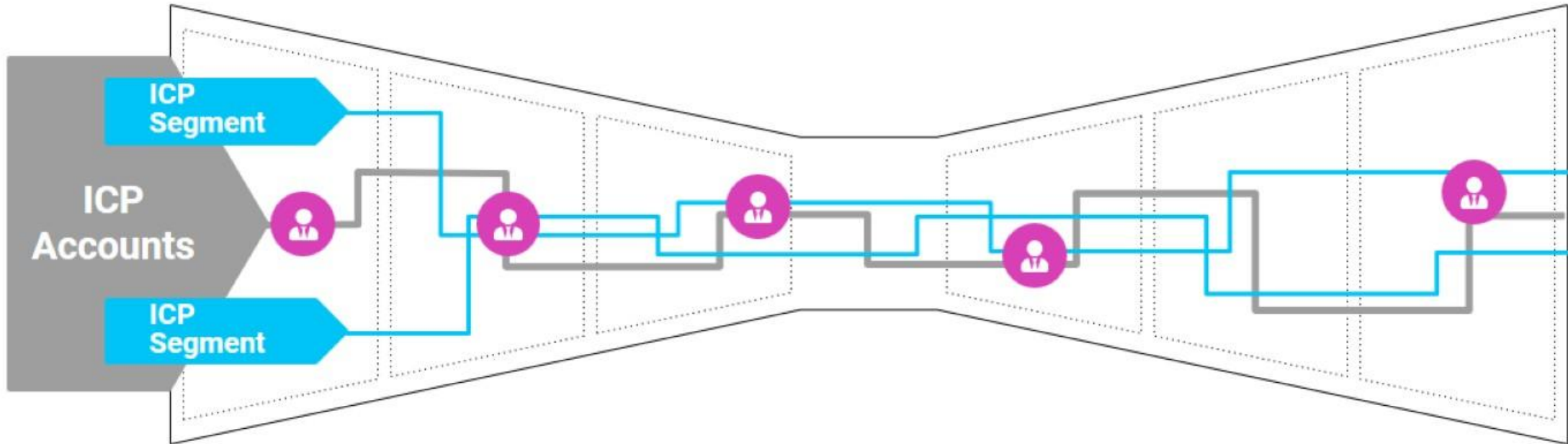
- Data you can get (research vs. discovery)
- Documented, well-known, teams aligned
- Operationalized in key systems, programs

- Apply scoring, prioritization
- Use for targeting and campaigns
- Follow throughout customer journey

Why do we need ICPs?



How ICPs can be applied across the bowtie?



A Practical Framework for Targeting and Messaging

1st Principle for Customer Acquisition:

Impact comes from solving Pain

MANDATES:

1. Find companies that likely have the Pains we can solve.
2. Show them we understand their Pain and can deliver Impact.

SPICED is a fundamental Winning by Design methodology that applies to every stage of the customer interaction. You will see it referenced across the entire customer journey.



Attributes that describe target customers (ICP Accounts, Segments, Personas)



Problems the customer needs help to solve



Results produced by the ideal solution

Asset Manager Rep.



WHAT THEY DO

- **Sales:** Convince plans or Advisor firms to invest
- **Advisor Partnership:** Collaborate with advisor firms to understand what assets might be helpful and what could be developed to meet their needs
- **Ecosystem Relationships:** Work with other stakeholders in the ecosystem that have common interest in improving investment performance
- **Research and Expertise:** Conduct in-depth research on financial markets, securities, and investment strategies to provide insights to advisors

LINKEDIN TITLES

Relationship Manager
DC Investment Manager
Regional Consultant

DC Specialist
Retirement Specialist

TOP PAINS

- **Navigating unpredictable market conditions** and portfolio performance
- Struggling to **get advisors interested** and using assets
- **Managing high client expectations** for investment performance
- Adhering to complex and evolving **regulatory requirements**

TOP IMPACTS

EMOTIONAL

- **Hit performance goals**, leading to career and business growth, and earning more
- Develop **partnerships that create mutual benefit** - quid pro quo
- Build **strong relationships with clients** where they trust and rely on your advice and expertise

RATIONAL

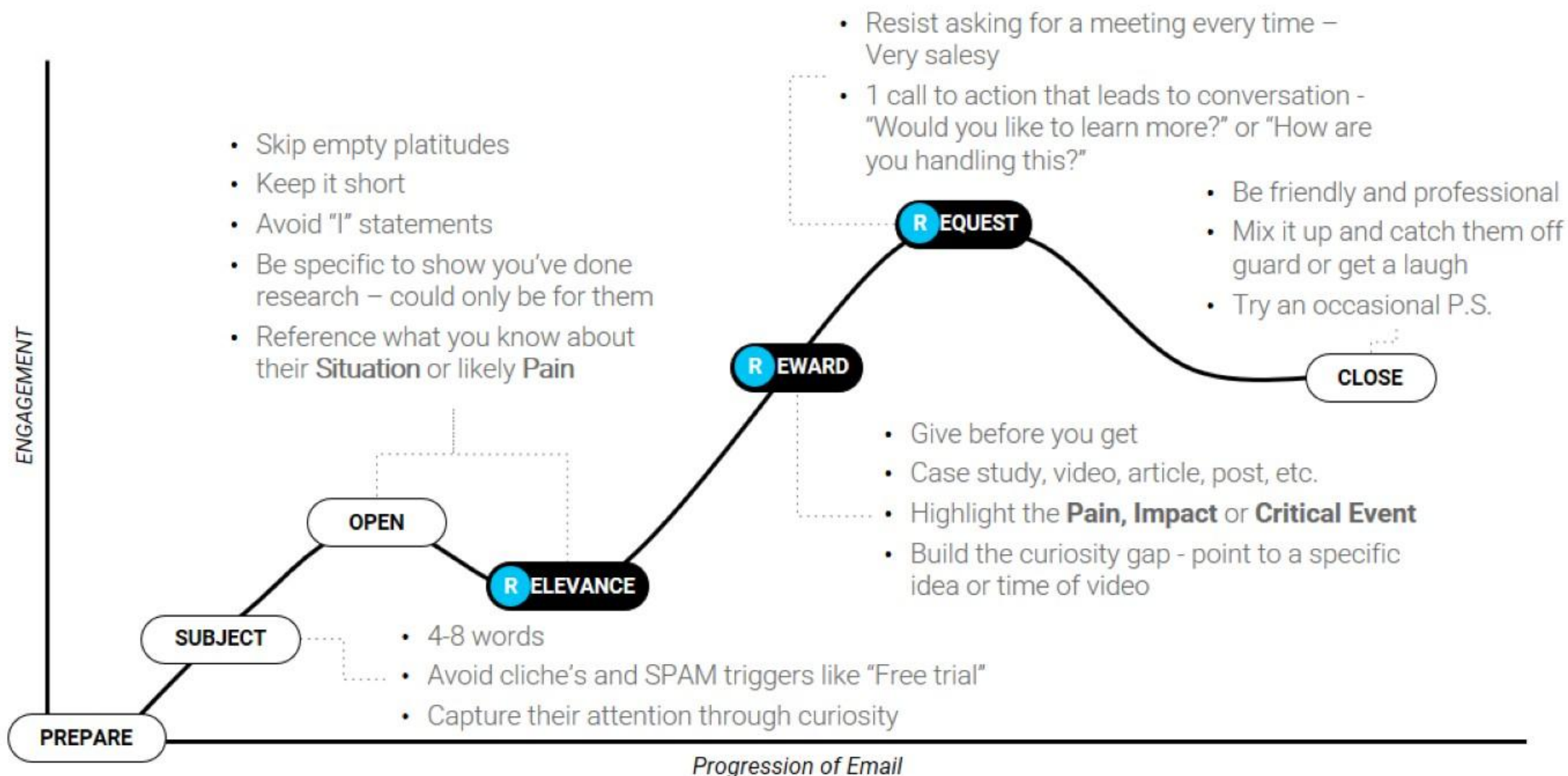
- **Growth:** Increase investments in assets and client acquisition
- **Returns:** Deliver consistently, outperform benchmarks and meet client expectations
- **Reputation:** Develop brand that helps with growth and acquisition

EXAMPLE

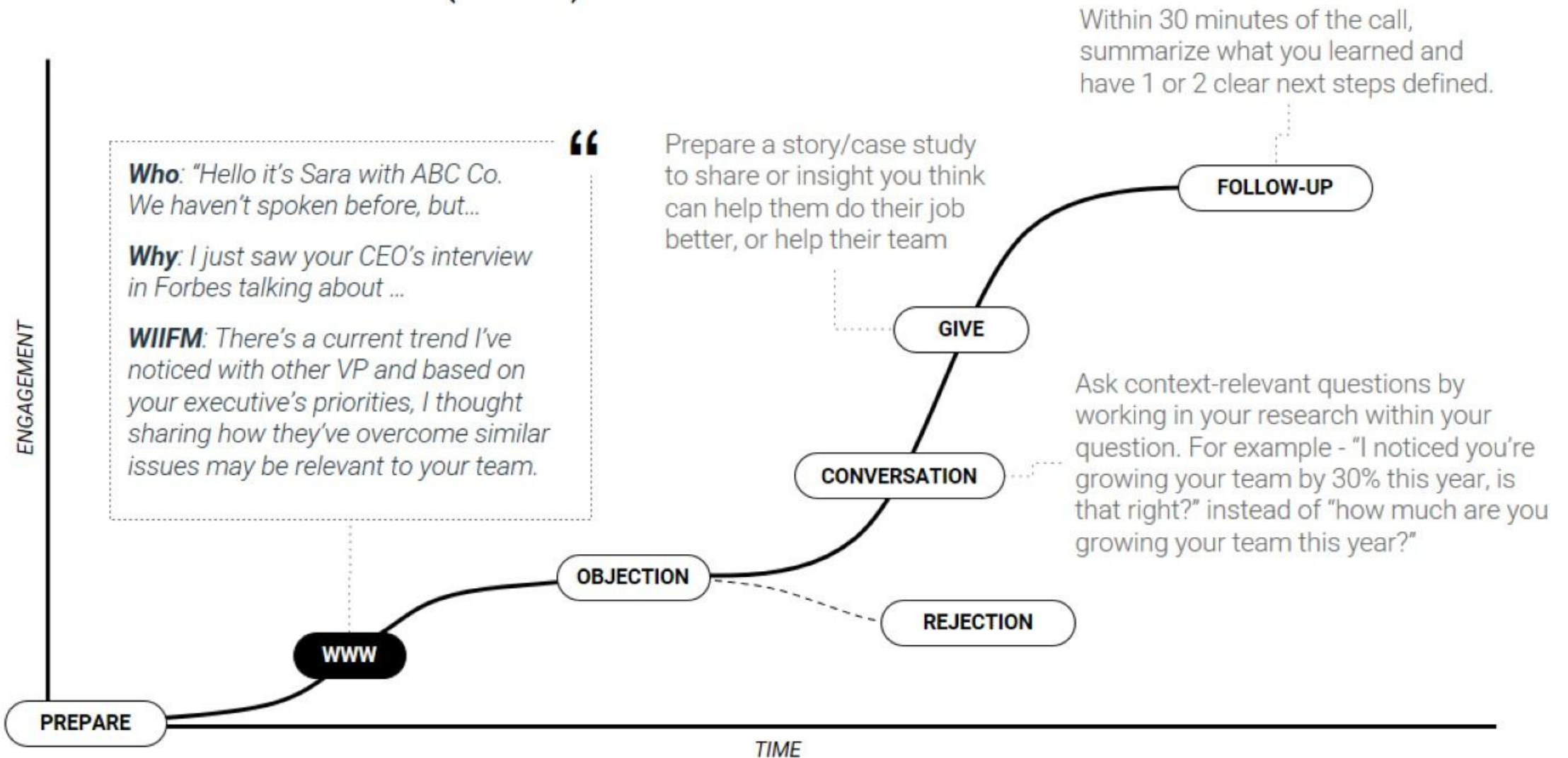
Precision Selling Method #2

Make Outreach More Client-Centric

How to Structure an Email



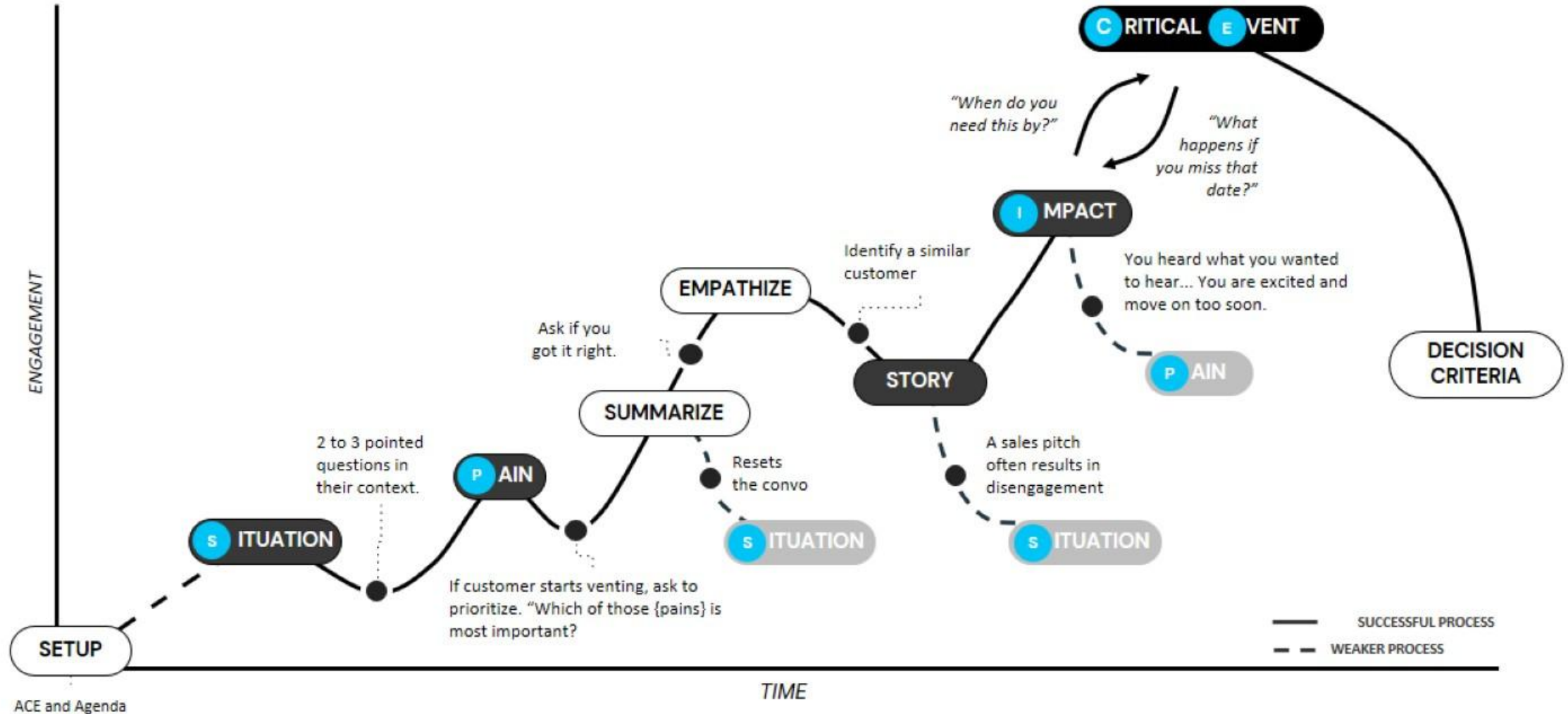
How to Structure a (Cold) Call



Precision Selling Method #3

Make Discovery Calls Engaging & Effective

The ideal Discovery Call with SPICED™



Precision Selling Method #4

Take Advantage of AI Efficiencies

AI GTM Archetypes

How companies are applying AI

Assistive



Empower individuals by closing skill gaps, automating repetitive tasks, and speeding up research through AI-powered tools.

Agentic



Systematically transition lower-complexity, high-volume human tasks to AI agents while maintaining or improving performance.

Orchestrative



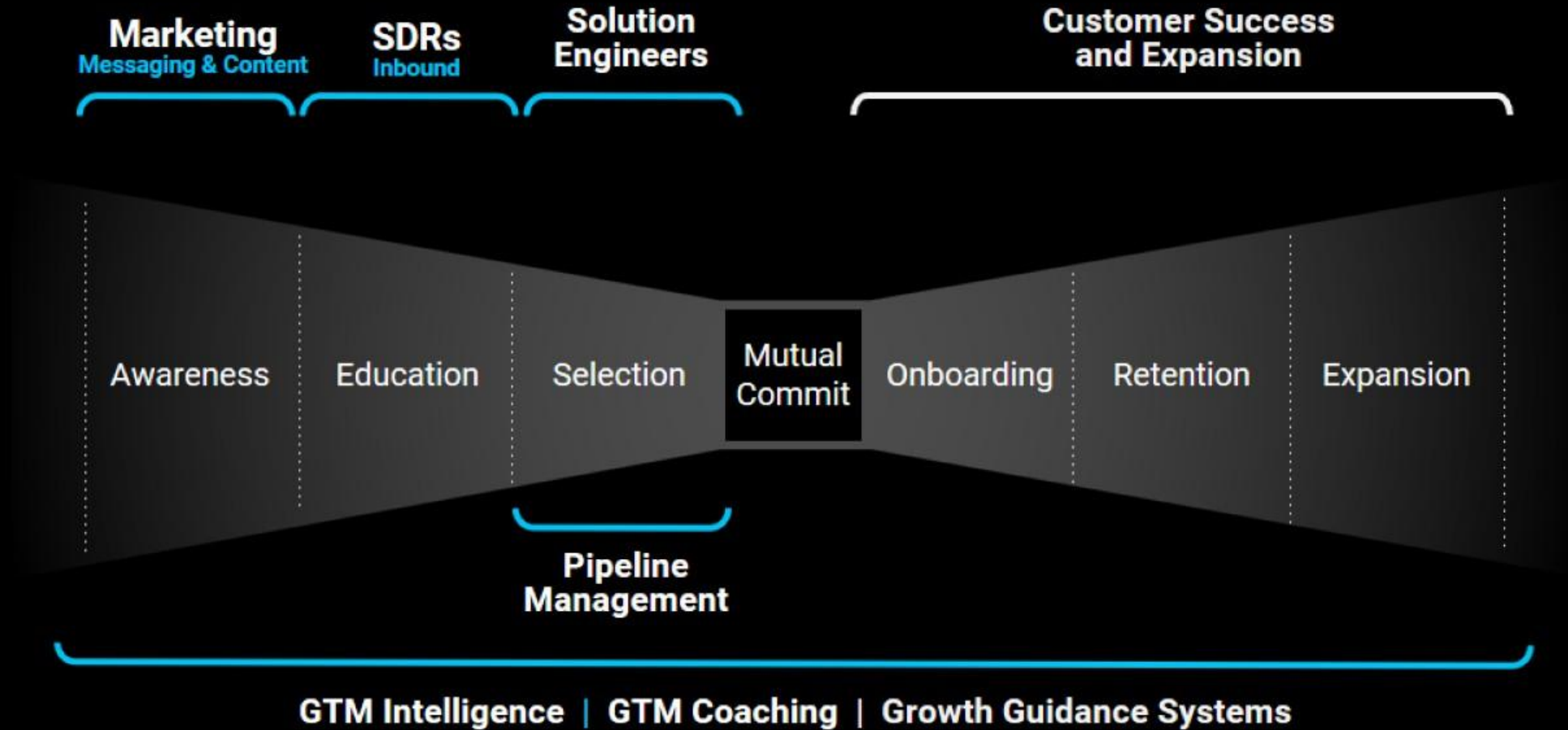
Integrate AI across multiple functions and stages of the GTM process to ensure smooth, optimized, and consistent workflows.

Autonomous

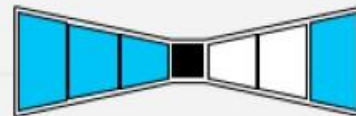


Enable AI systems to make decisions independently within human-set boundaries, frameworks, and objectives.

AI Research Across The Entire Customer Journey



An entire GTM campaign built
and executed by AI, with over 50 assets



50+
ASSETS

\$100M
ATTRACTING ACQUIRER

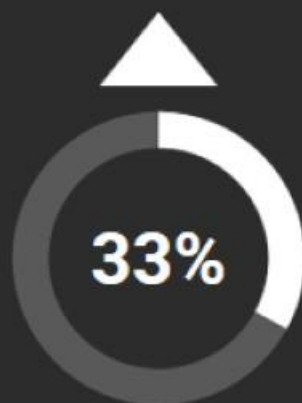
BL.INK implemented
VelocityEngine to build
and execute an entire
GTM campaign of 50+
assets, attracting a
\$100M acquirer.

Leigh Choate
VP Marketing



AI tech used: VelocityEngine

Implementing an AI agent for inbound leads to drive revenue and insights



PURCHASE
INCREASE



RICH ENGAGEMENT
INSIGHTS

HubSpot implemented 1mind's AI Agent to drive purchase increases and uncover deeper lead insights via conversations.

Neda Stoll
Sr. Director of
Marketing

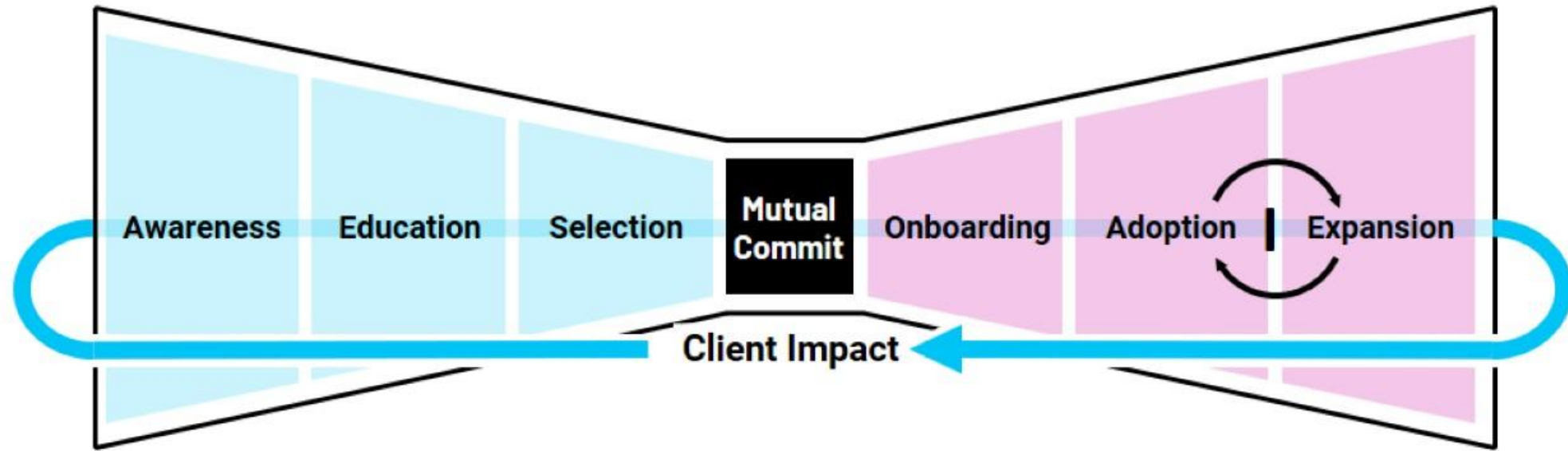


AI tech used: 1mind

Precision Selling Method #5

Invest in Advocacy & Referrals

Recurring Revenue is the result of Recurring Impact



Low-Cost, High-Return Investments in Advocacy & Referrals



Regular Impact Reviews

- Schedule time to review the work you've done together
- Highlight results & where to improve
- Package it up for sharing (internally and beyond...)



Customer Stories

- Collect and use notable stories of impact – **emotional and/or rational**
- Feature the customer as the hero (don't even mention yourself if possible)
- Amplify it across channels



Unreasonable Hospitality

- Monitor triggers – news alerts, job changes, life events, etc.
- Anticipate needs and offer proactive support
- Show you're truly invested in a trusting relationship



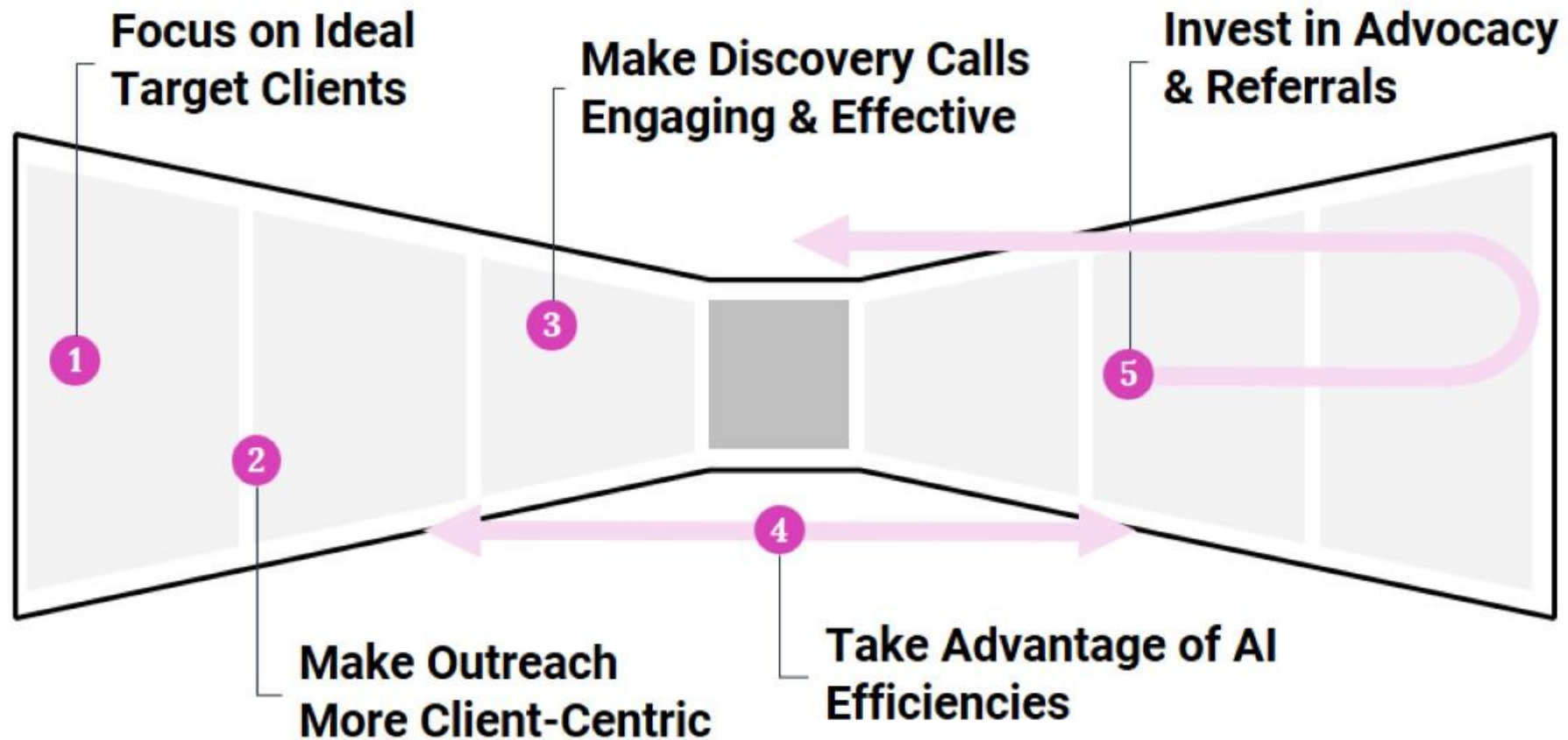
Intentional Networking

- Find your ICP and figure out how to get connected
- Ask for referrals and connections - specific, reasonable, and mutually beneficial
- Do the work for them

Precision Selling

Takeaways

5 Precision Selling Methods



Delivering Impact for our customers

#1 rated provider in these G2 categories:

🏆 Sales Consulting

🏆 Customer Success Training

🏆 Sales Training

🏆 Account Based Marketing Consulting

youtube.com/winningbydesign

jim@winningbydesign.com



3,000
*GTM leaders
trained on
Revenue
Architecture*



The power to
GROW