Building Agile Organizations

Mapping how work moves. Finding what needs to change.

A collection of frameworks I developed and adapted across operations, sales, and customer delivery before founding Bytespace.

Includes established methods such as MEDDPICC, root-cause analysis, and agile planning. The examples illustrate an approach, not a single company deployment or a guarantee of results.

PUBLIC EDITION / Selected methodology and implementation examples

Process Overview

Through this process, we aim to map out and optimize the organization. Starting at a high-level and systematically working our way down, we will identify inefficiencies and using agile PM methodologies to tackle specific focus areas.

Phase 1

Map Organization & Select Focus Areas

- **1.1** Design Org Charts & Reporting
- **1.2** Map Departments,Roles, &Cross-Departmental Flows
- **1.3** Identify Core Systems
- **1.4** Analyze & Build Processes
- **1.5** Outline Replicable Procedures

Phase 2

Identify Problems & Design Solutions

- **2.1** Brainstorm & Pick Focus Areas
- **2.2** Collect Data & Observe
- **2.3** Identify Core Problems & Misalignments
- **2.4** Research & Design Solutions

Phase 3

Deploy Agile PM Methods & Assess Results

- **3.1** Prioritize Sprints & Assign Tasks
- **3.2** Execute & Monitor Progress
- **3.3** Assess & Adapt as Needed

Phase 1: Map Organization & Select Focus Areas

This is the part where we take an inventory of what we've already built. Outlining existing organizational structures, systems, processes, and procedures to better understand what's working, what's not working, and where we should focus first.

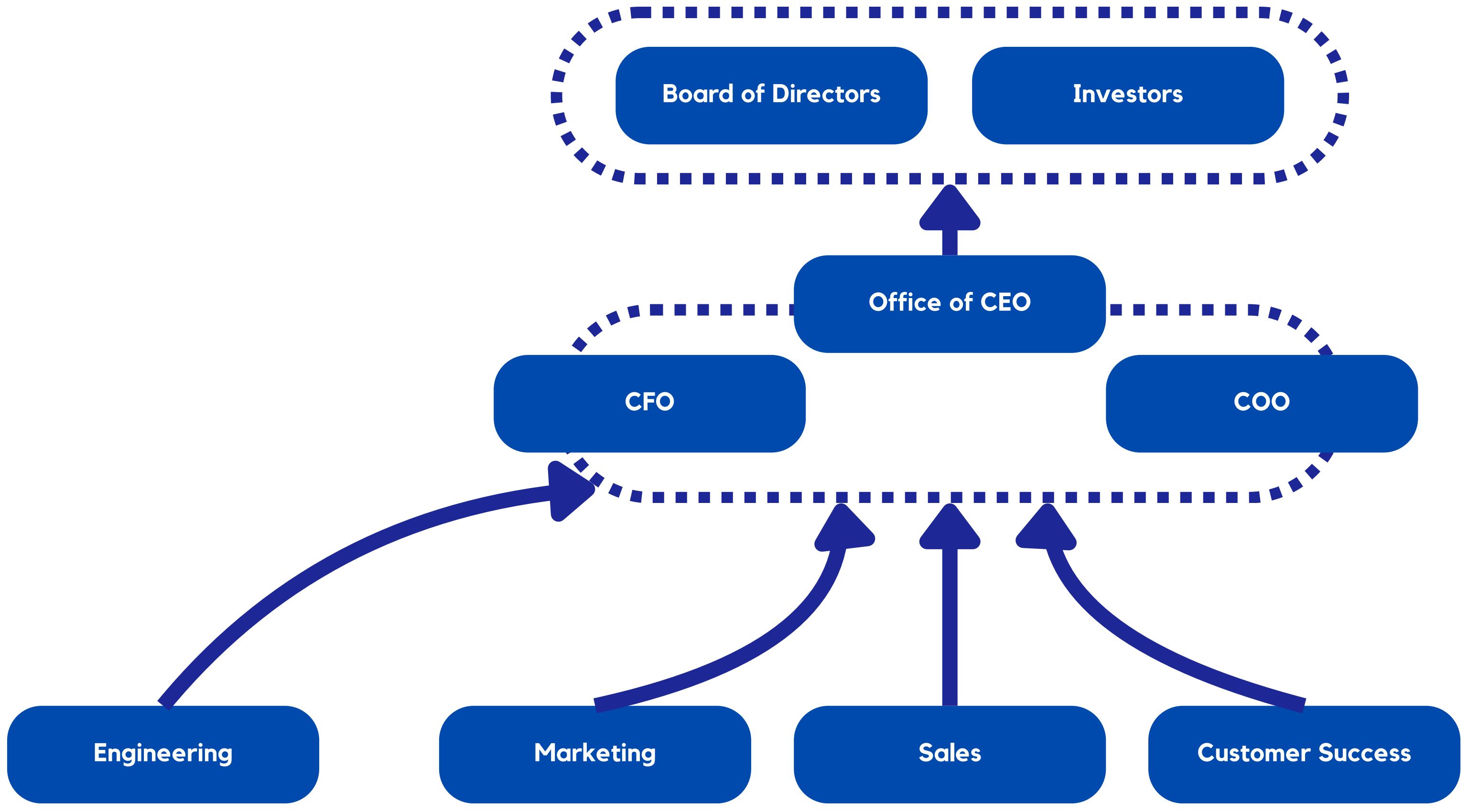
1.1: Design Org Charts & Reporting

"Superstructure": general framework for how resources and information flows within the organization.

Definition of Organizational Goals & Key Objectives

Identification of Key Stakeholders

Organizational Chart



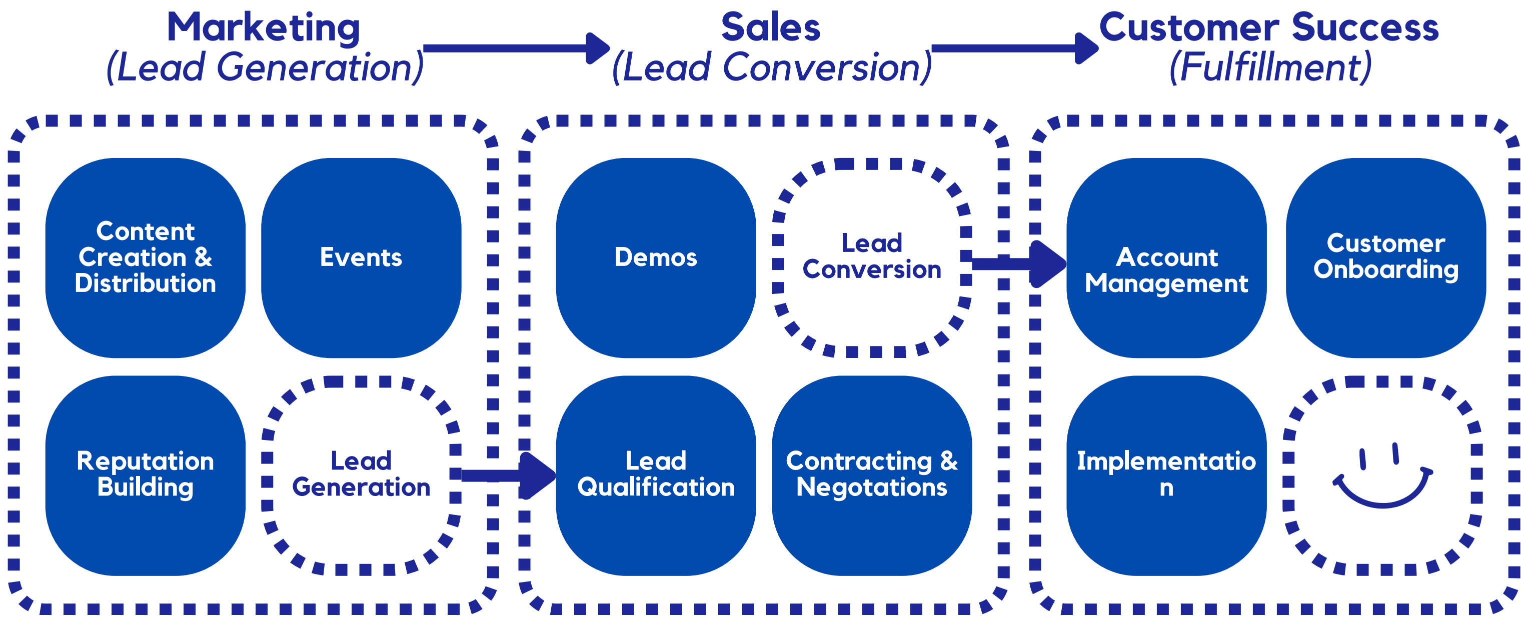
1.2: Map Departments, Roles, and Cross-Deparmental Flows

"Substructures": departmental frameworks for roles and cross-functional

Departmental Analysis

Role Mapping

Inter-Departmental Relationships



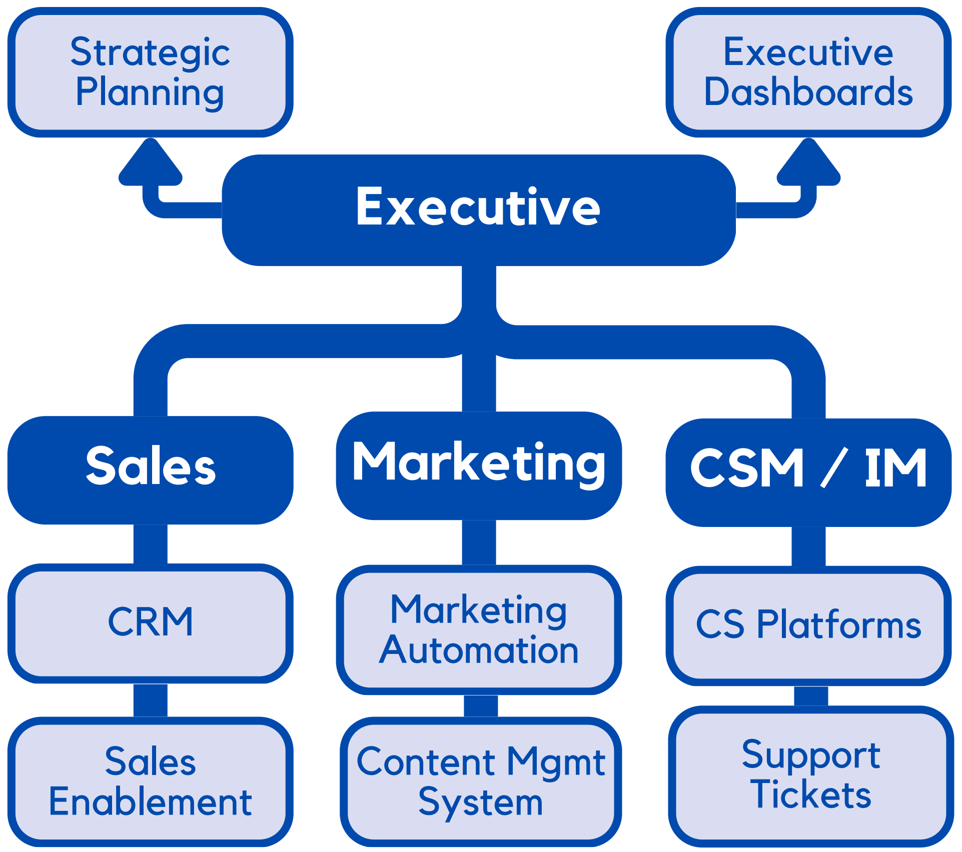
1.3: Identify Core Systems

"Systems": High-level business functions merging multiple processes.

Inventory of Current Systems

System Integration Analysis

System Effectiveness Evaluation



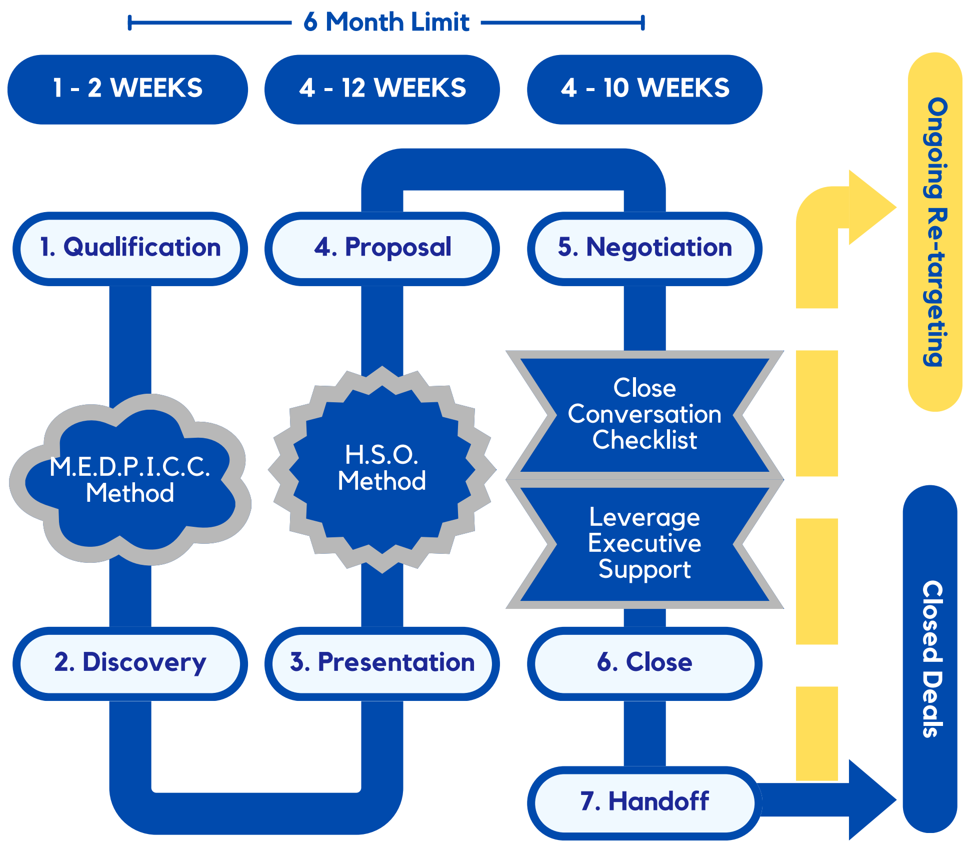
1.4: Analyze & Build Processes

"Processes": Mid-level business functions merging multiple procedures.

Process Mapping

Process Flow Analysis

Process Standardization



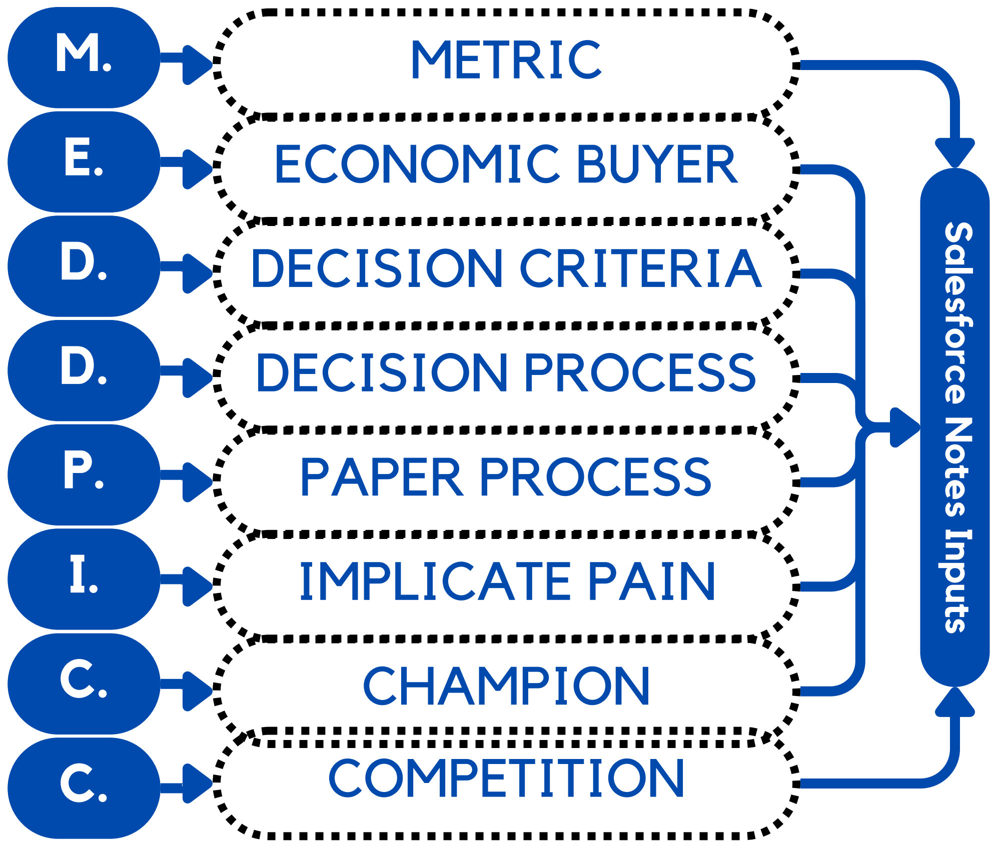
1.5: Outline Replicable Procedures

"Procedures": Low-level business functions describing tasks.

Procedure Documentation

Procedure Review

Procedure Training



Phase 2: Identify Problems & Design Solutions

Next we review the organizational maps to determine gaps and inefficiences, prioritizing higher impact activities initially to build momentum. Then we refine those systems to enhance cohesion and efficiency between and within departments.

2.1: Brainstorm & Pick Focus Area(s)

"Solution Prioritization":

- *Brainstorming Sessions*
- *Solution Proposals*
- *Stakeholder Input*

2.2: Collect Data & Observe

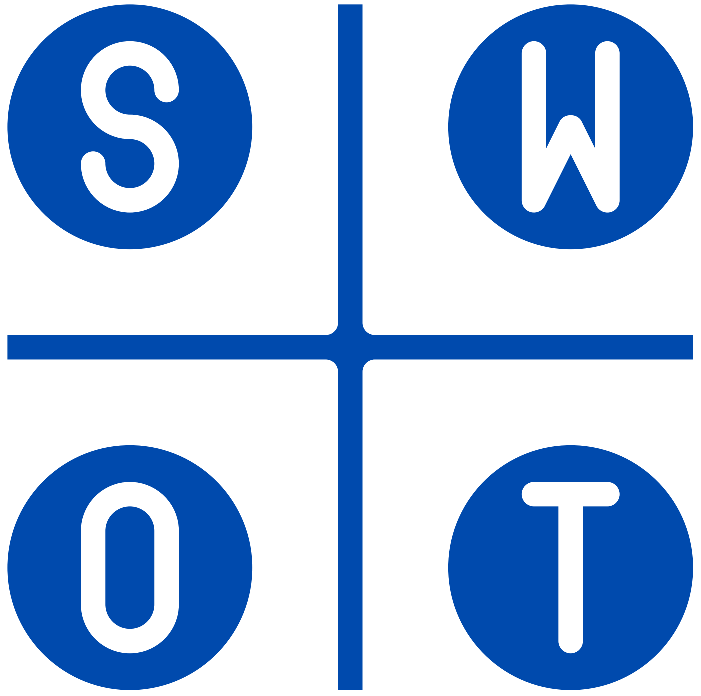
"Data Collection & Analysis":

- *Surveys & Interviews*
- *Performance Metrics*
- *Observation*

2.3: Identify Core Problems & Misalignments

"Root Cause Analysis":

- *Fishbone Diagram*
- *5 WHY's*
- *SWOT Analysis*



2.4: Research & Design Solutions

"Solution Design":

- *Best Practices Research*
- *Impact-Effort Matrix*
- *Roadmap Development*

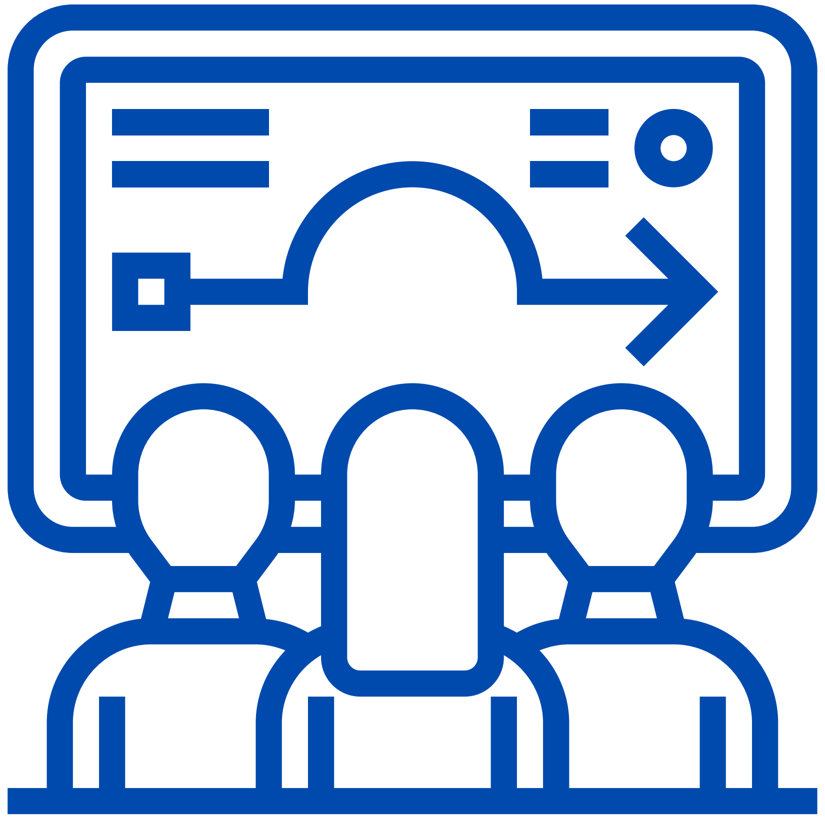
Phase 3: Deploy Agile PM Methodologies & Assess Results

Now that we've mapped the organization, understood what problems need solving, and prioritzed our focus, we will develop action plans. Using agile methodlogies, we'll conduct weekly operational sprints with department heads and SMEs to achieve results.

3.1: Prioritize Sprints & Assign Tasks

"Agile Planning":

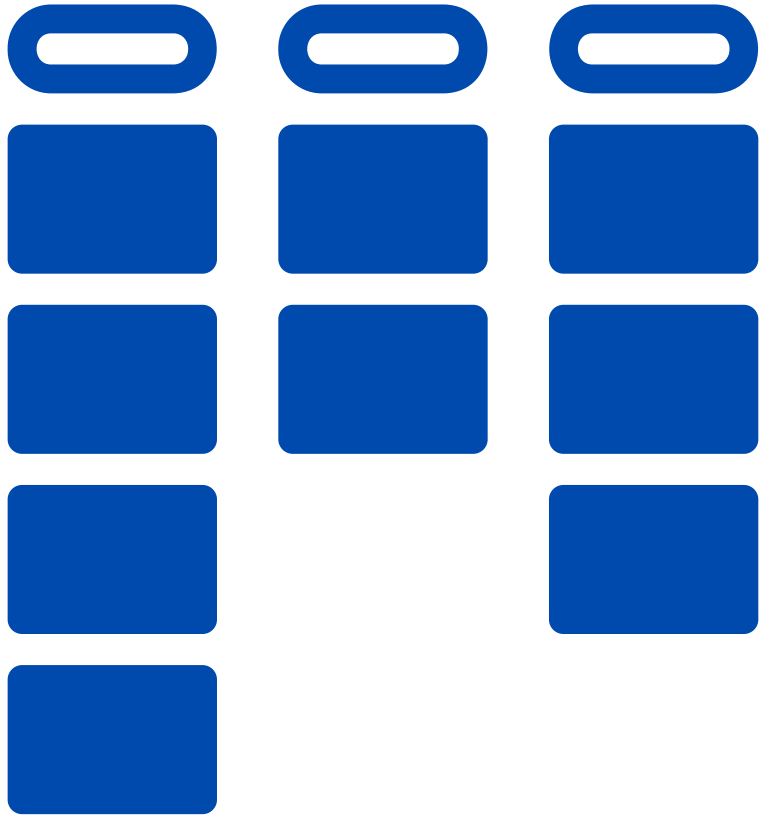
- *Sprint Planning*
- *Backlog Prioritization*
- *Task Assignment*



3.2: Execute & Monitor Progress

"Agile Execution":

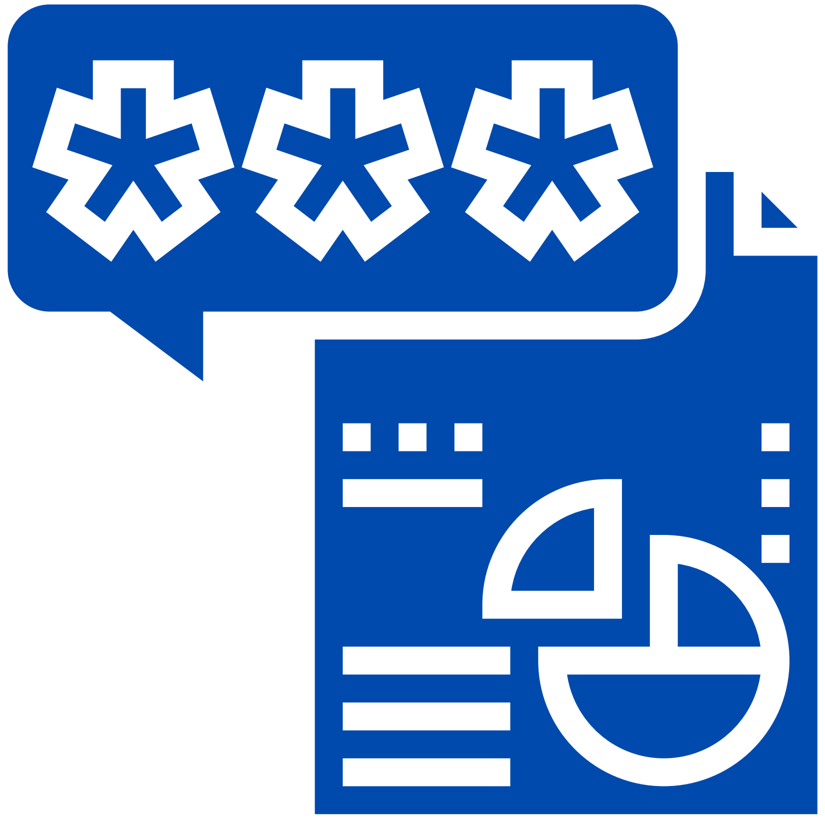
- *Daily Standups*
- *Kanban Boards*
- *Iteration Review*



3.3: Assess & Adapt as Needed

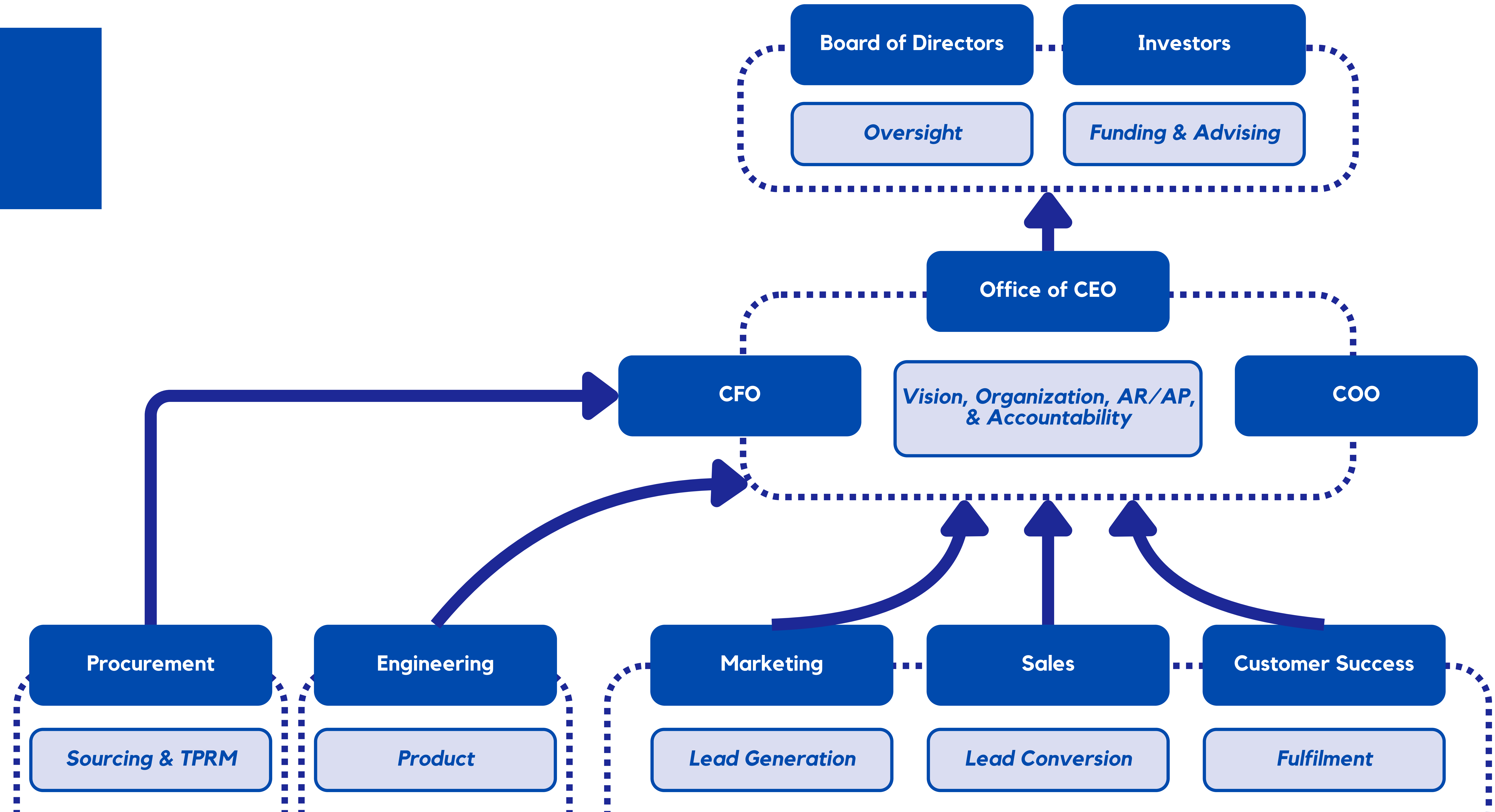
"Agile Assessment":

- *Sprint Retrospective*
- *Performance Metrics*
- *Continuous Improvement*



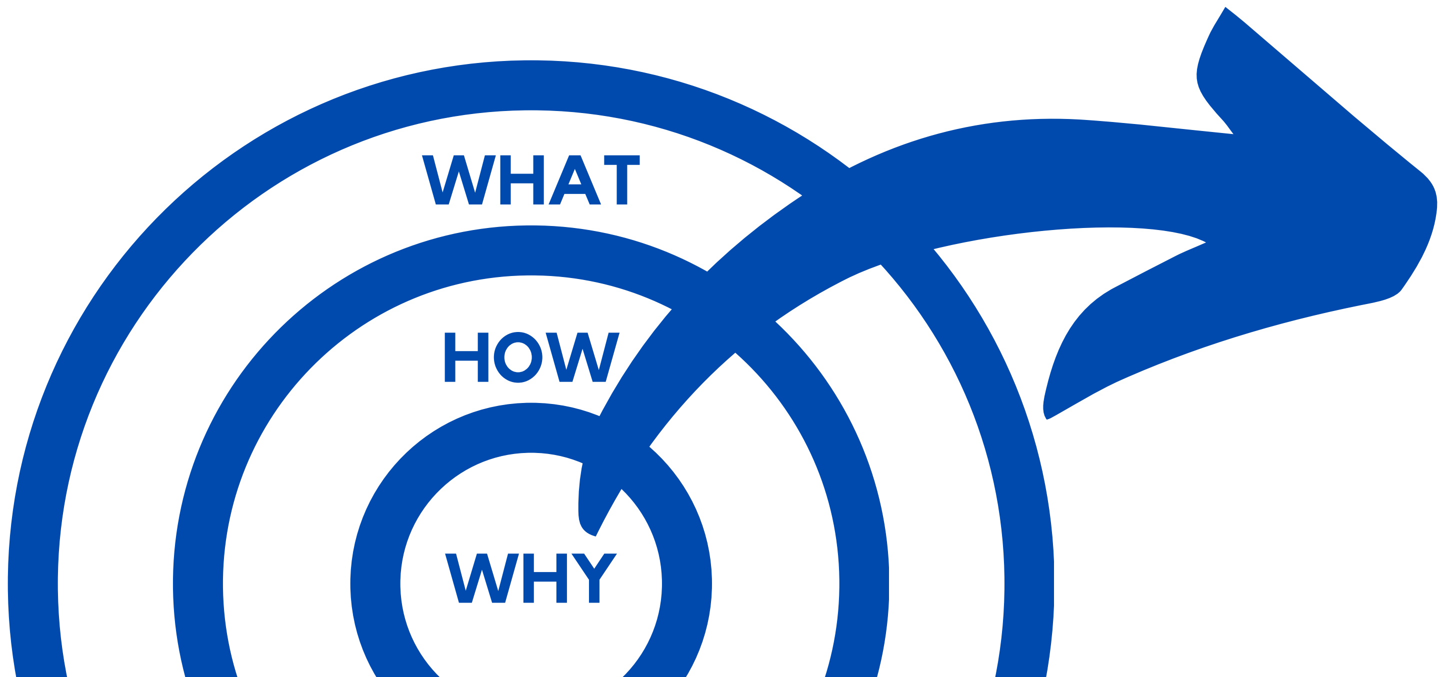
Step 1: Establish Reporting Structure & Fundamental Philosophies

Figure out how we measure success for each department. Establish KPIs and weekly, quarterly, and annual reporting expectations. Create executive dashboards. Create cohesive philosophies which operate as the organizational bedrock.


Board of Directors
Investors
Oversight
Funding & Advising
Office of CEO
CFO
Vision, Organization, AR/AP, & Accountability
COO
Procurement
Engineering
Marketing
Sales
Customer Success
Sourcing & TPRM
Product
Lead Generation
Lead Conversion
Fulfilment

Role Fundamentals

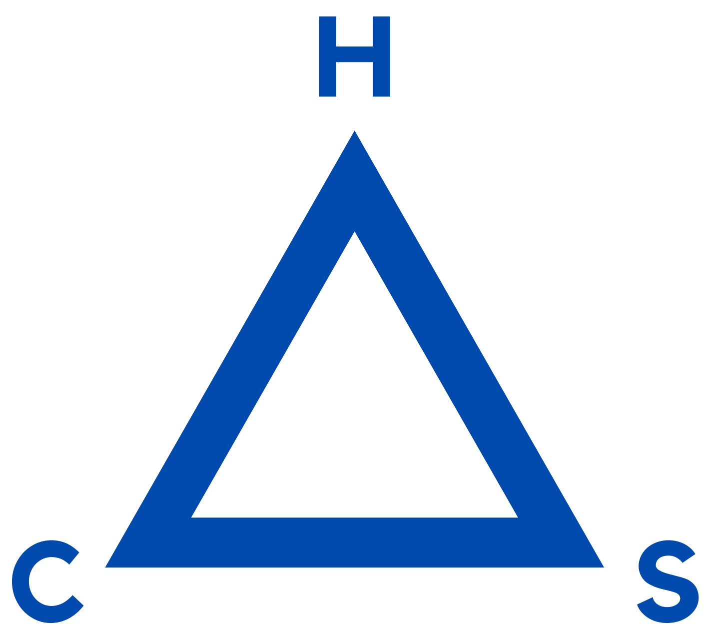
	Roles	Focus	Function
E	Entrepreneur	Future	**Focused on the WHY.** Sets strategic company vision with respect to their department. Plans expansion efforts and growth strategies. Path to success is ambiguous and to be defined through creativity. Solves the "why" questions in people's minds. Why should I work here? Why should I buy from you? Why do we do what we do? Etc.
M	Manager	Past	**Focused on the HOW.** Analyzes past performance. Builds systems and processes which help to replicate prior successes and mitigate prior failures. Given clear and concrete success criteria on behalf of team. Solves the "how" questions in people's minds. How do we scale? How do we track progress? How do we communicate our findings? Etc.
T	Technician	Present	**Focused on the WHAT.** Completes day to day tasks required to remain on target to meet goals. Executes on vision and strategy within established frameworks. Is given clear and concrete success criteria. Solves the "what" questions in peoples minds. What will it take to close this deal? What should our next piece of content look like? What's working? Etc.



Success = The progressive realization of a worthy ideal.

Success = Energy + Matter, in its most organized state.

Business Fundamentals



H — **Humans**: **Includes all people in, or associated with, the productive functioning of the business.** For example: staff, advisors, investors, implementation partners, referral partners, integration partners, clients, board of directors, event attendees, etc.

S — **Systems**: **Includes all systems that allow the business to operate efficiently and effectively.** For example: Lead Generation Sys, Lead Conversion Sys, Client Fulfillment / Implementation Sys, AR /AP Sys, Channel Partner Sys, Recruiting / HR Sys, Content Creation Sys, Supply Chain Sys, etc.

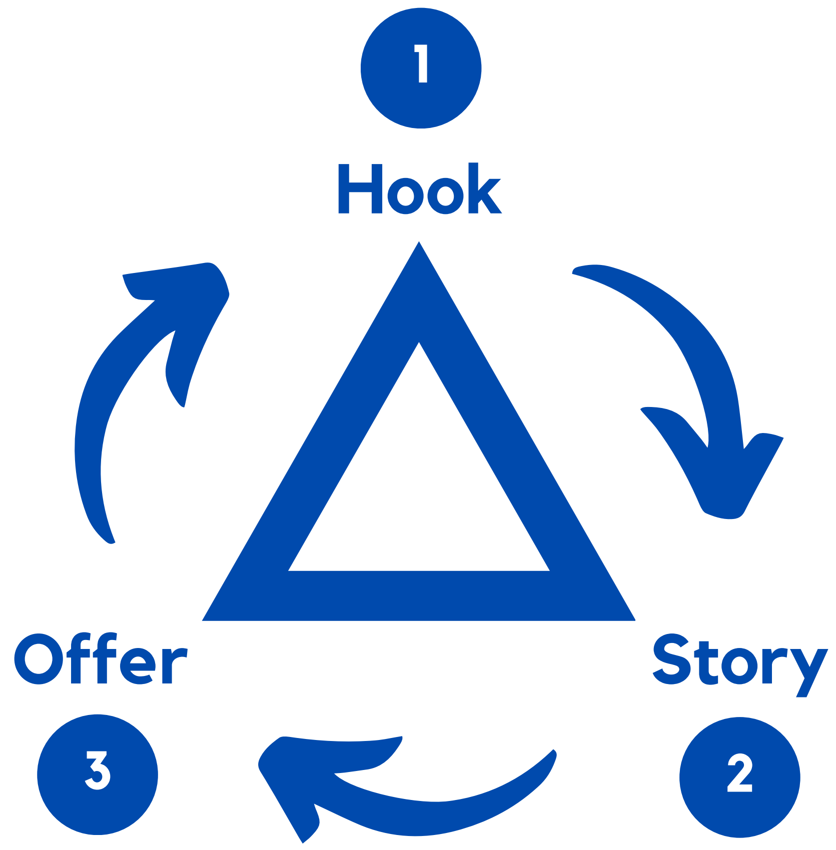
C — **Capital**: **Includes all sources of capital used to run and complete business functions.** For example, sales revenue, personal investment, venture capital, angel investors, equity crowdfunding, IPO, bank loans, business credit cards, credit lines, grants, subsidies, invoice financing, etc.

H + S = If you have capable **Humans** and robust **Systems**, then **Capital** is sure to come your way in short order.

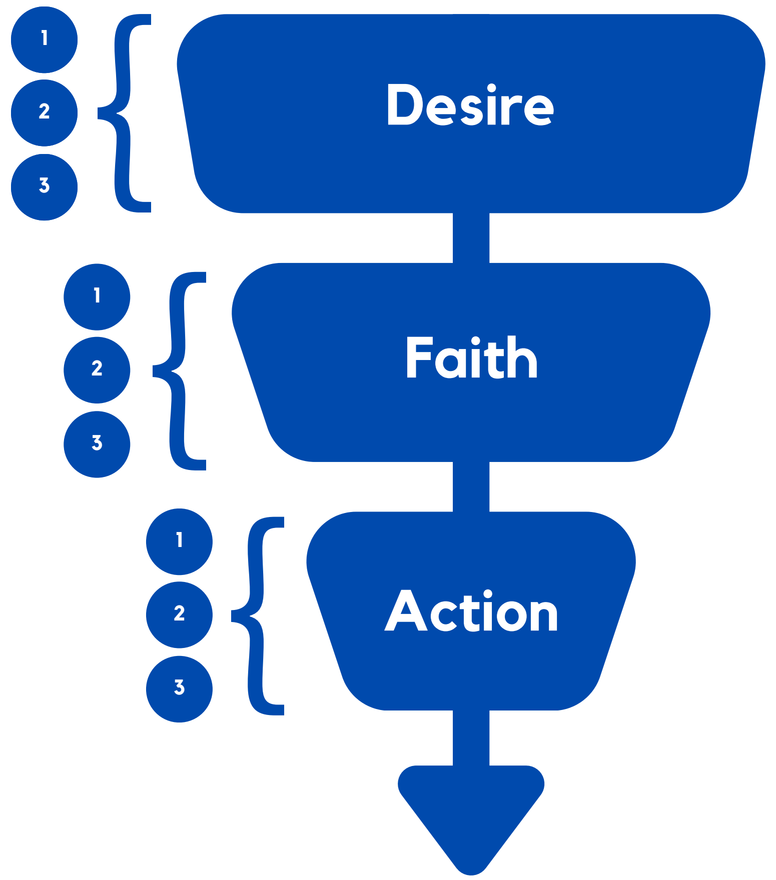
S + C = If you have robust **Systems** and ample **Capital**, then it's easy to attract and retain capable **Humans**.

C + H = If you have ample **Capital** and capable **Humans**, then it's easy to build out and scale robust **Systems**.

Marketing & Sales Fundamentals



H	**Hook**	**Focus on the WHY.** The hook is all about the capturing the audience's attention. Why is this important to them? Whether telling a story, or making a sale, the intention of the hook is to create a **DESIRE** within the prospect to keep listening, reading, etc.
S	**Story**	**Focus on the HOW.** The story is all about demonstrating relevance and building interest. How does your solution work? How does it fit into their life? The intention here is to build **FAITH**, that what you're "selling" is relevant and you can deliver effectively.
C	**Offer**	**Focus on the WHAT.** The offer is a CTA directed toward closing the deal. Getting a commitment out of the prospect and moving them from one stage of the cycle to the next. The offer is all about getting the prospect to take **ACTION**.



1. Lead Generation	**Primarily attributed to MARKETING.** It's Marketing's responsibility to build general brand awareness, filter prospects, create a desire within leads that are pre-qualified, and to set the stage for productive handoff to sales and partnership teams.
2. Lead Conversion	**Primarily attributed to SALES.** It's Sales's responsibility to qualify leads, demonstrate product-customer fit, outline project requirements, negotiate, close the deal, and facilitate an effective handoff to CSM / IM teams.
3. Client Fulfilment	**Primarily attributed to CUSTOMER SUCCESS & IMPLEMENTATION.** It's the CSM / IM's responsibility to ensure reasonable project expectations, project execution under delivery timelines, efficient customer onboarding, and regular check-ins through annual client renewals.

Reporting

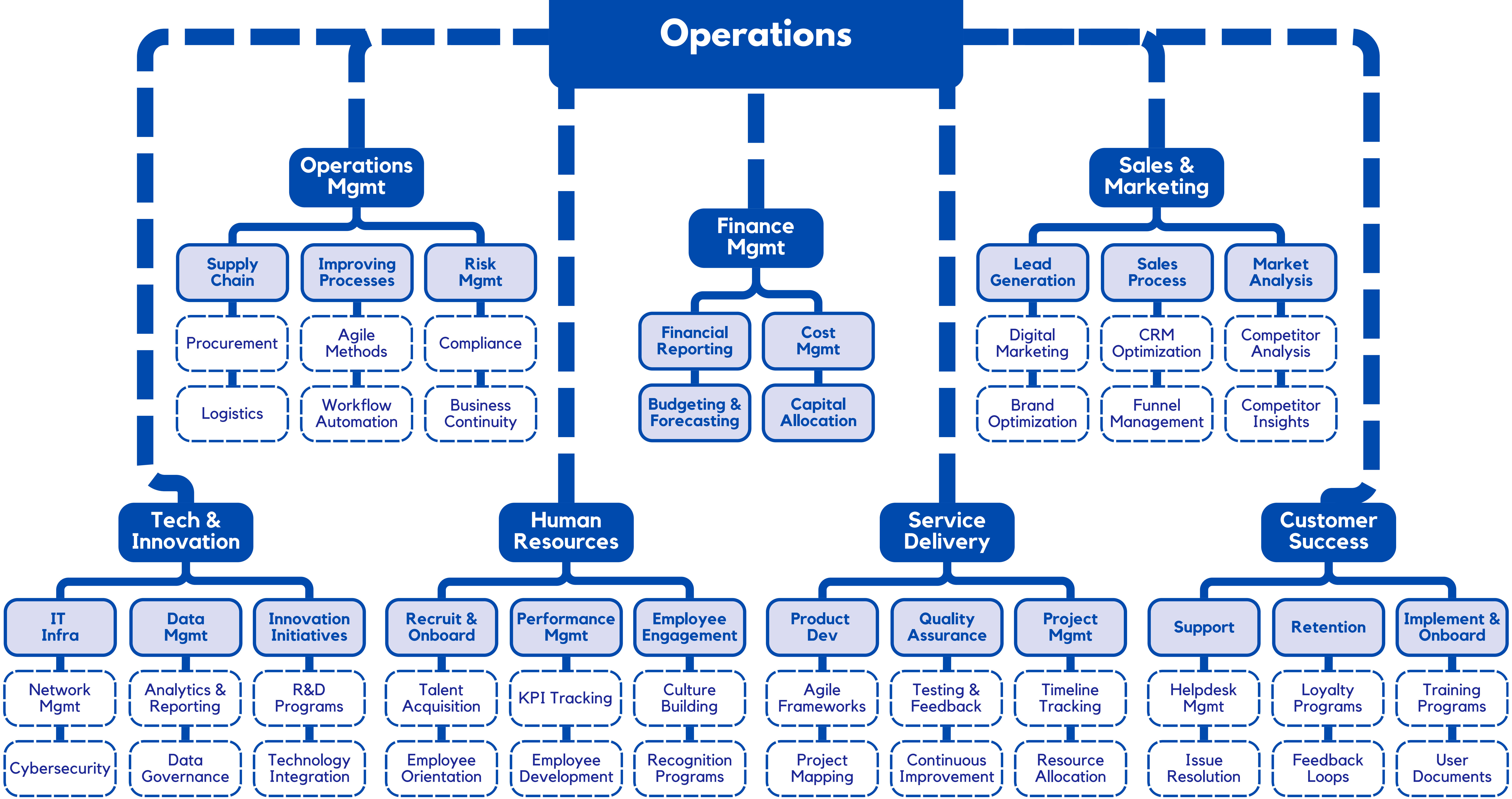
Strategic Targets

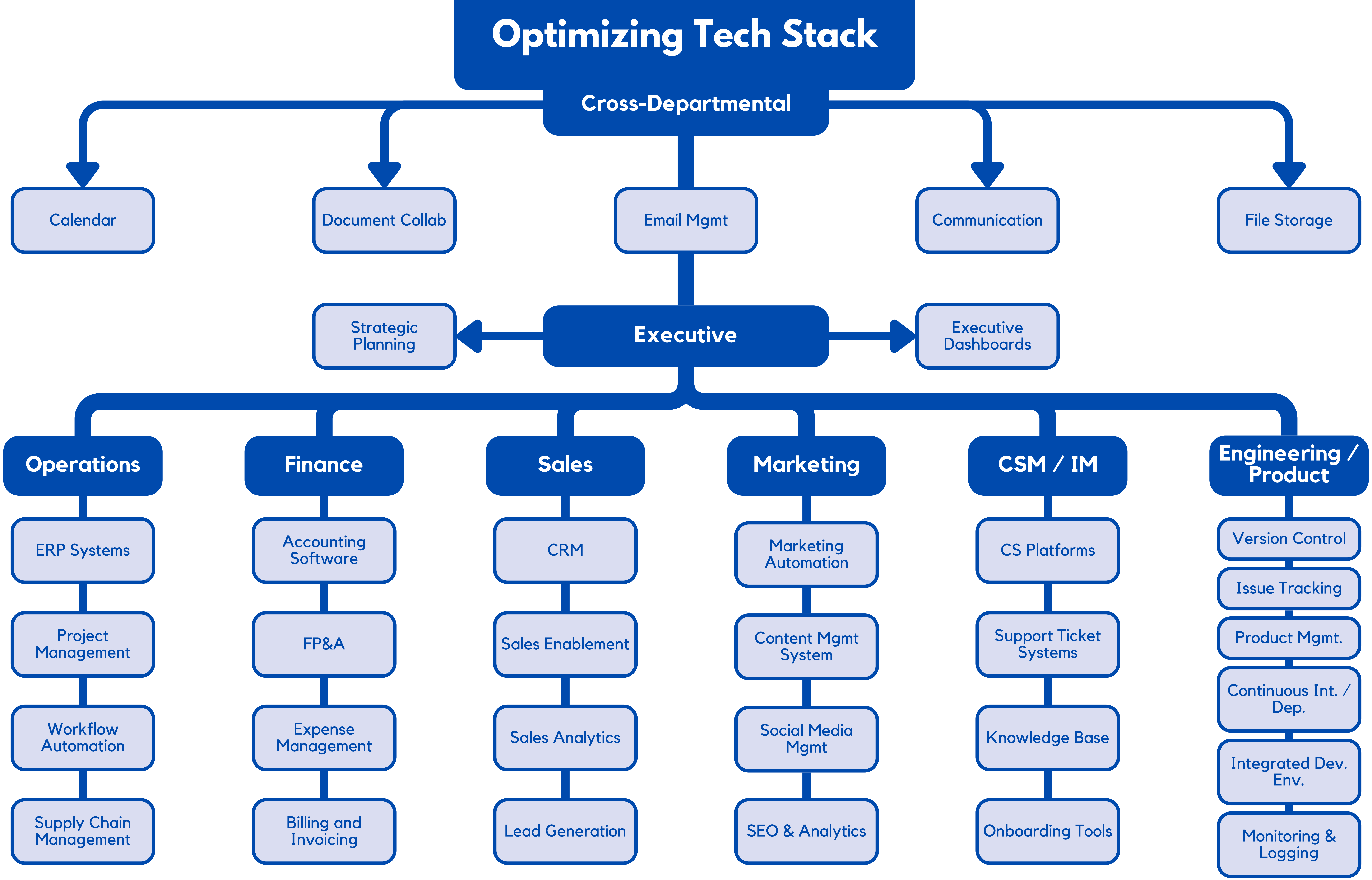
		Measured KPIs	Report Content
Product / Engineering	Development Velocity	1. **Development Velocity:** Pace of work completion (e.g., story points completed per sprint). 2. **Release Cycle Time:** time from development to production. 3. **Bug Rate:** # of bugs found post-release vs. pre-release. 4. **Feature Adoption:** Percentage of users adopting new features. 5. **System Uptime:** The reliability and availability of the product.	• Current sprint progress and velocity. • Status of major projects and feature developments. • Bug rates and resolution times. • Performance and uptime metrics. • Roadblocks or issues needing executive attention.
Marketing	Customer Acquisition Cost	1. **Lead Generation:** Number of new leads generated. 2. **Conversion Rate:** Percentage of leads converting to customers. 3. **Customer Acquisition Cost (CAC):** The cost of acquiring a new customer. 4. **Return on Marketing Investment (ROMI):** Revenue generated from marketing efforts. 5. **Brand Awareness:** Metrics like social media engagement, website traffic, and PR mentions.	• Overview of current campaigns and performance metrics. • Lead generation numbers and conversion rates. • CAC and ROMI analysis. • Insights from A/B testing and optimization efforts. • Upcoming campaigns and strategic initiatives.
Sales	Sales Revenue	1. **Sales Revenue:** Total revenue generated. 2. **Sales Growth:** Year-over-year or month-over-month growth. 3. **Sales Cycle Length:** Time taken to close a deal. 4. **Customer Lifetime Value (CLV):** Projected revenue from a customer over their entire relationship with the company. 5. **Win Rate:** Percentage of deals won versus lost.	• Sales revenue and growth metrics. • Pipeline status and forecasts. • Win/loss analysis and reasons. • Average sales cycle length. • Updates on key accounts and deals. • Accounts needing executive escalation.
Customer Success	Customer Retention	1. **Customer Satisfaction (CSAT):** Measure of customer satisfaction. 2. **Net Promoter Score (NPS):** Likelihood of customers to recommend the product. 3. **Customer Retention Rate:** Percentage of customers retained over a period. 4. **Churn Rate:** Percentage of customers lost over a period. 5. **Time to Resolution:** Average time taken to resolve customer issues.	• CSAT and NPS scores. • Customer retention and churn rates. • Summary of support tickets and resolution times. • Insights from customer feedback and surveys. • Updates on customer onboarding and success programs.

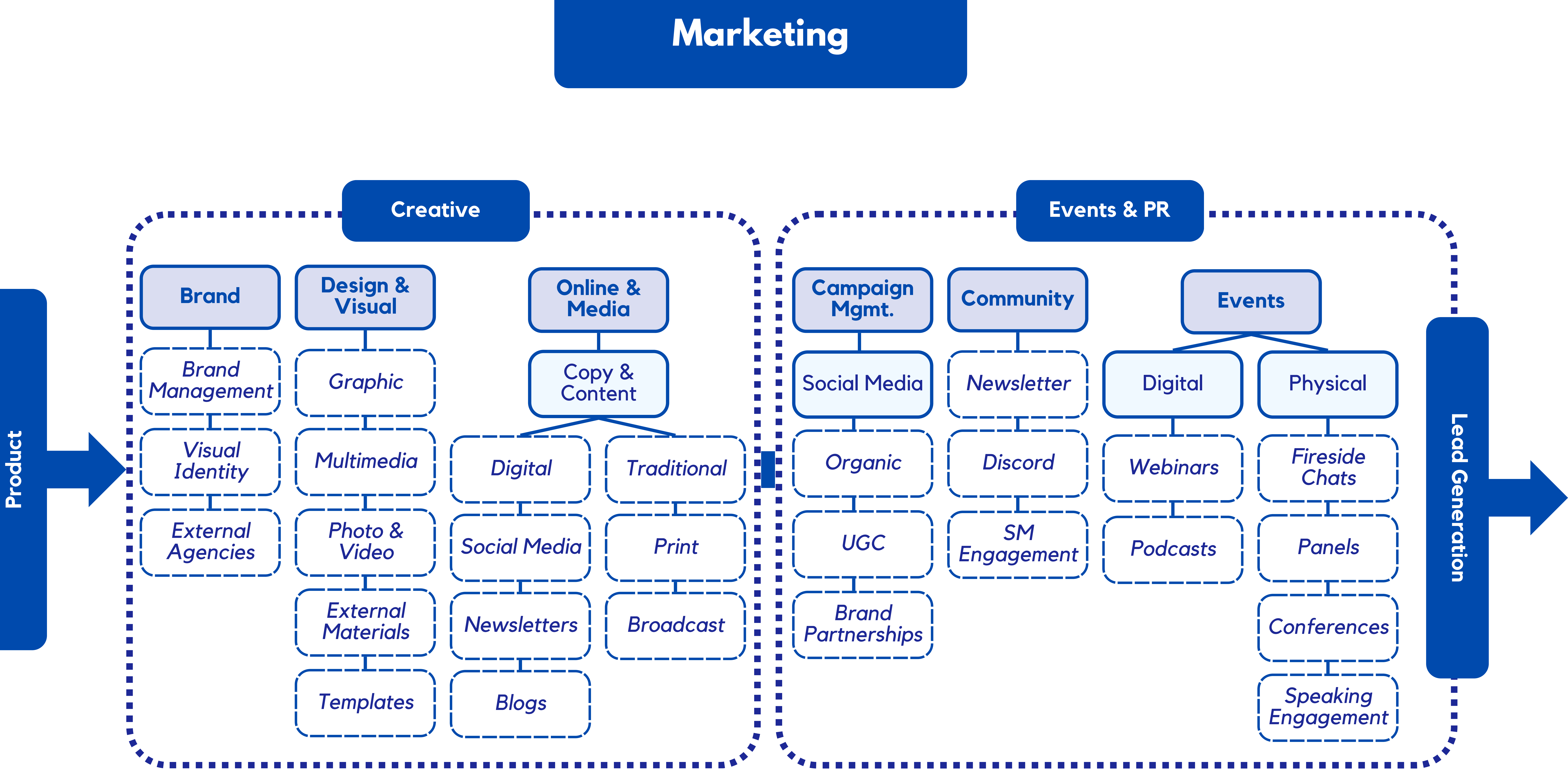
Weekly Report to Execs

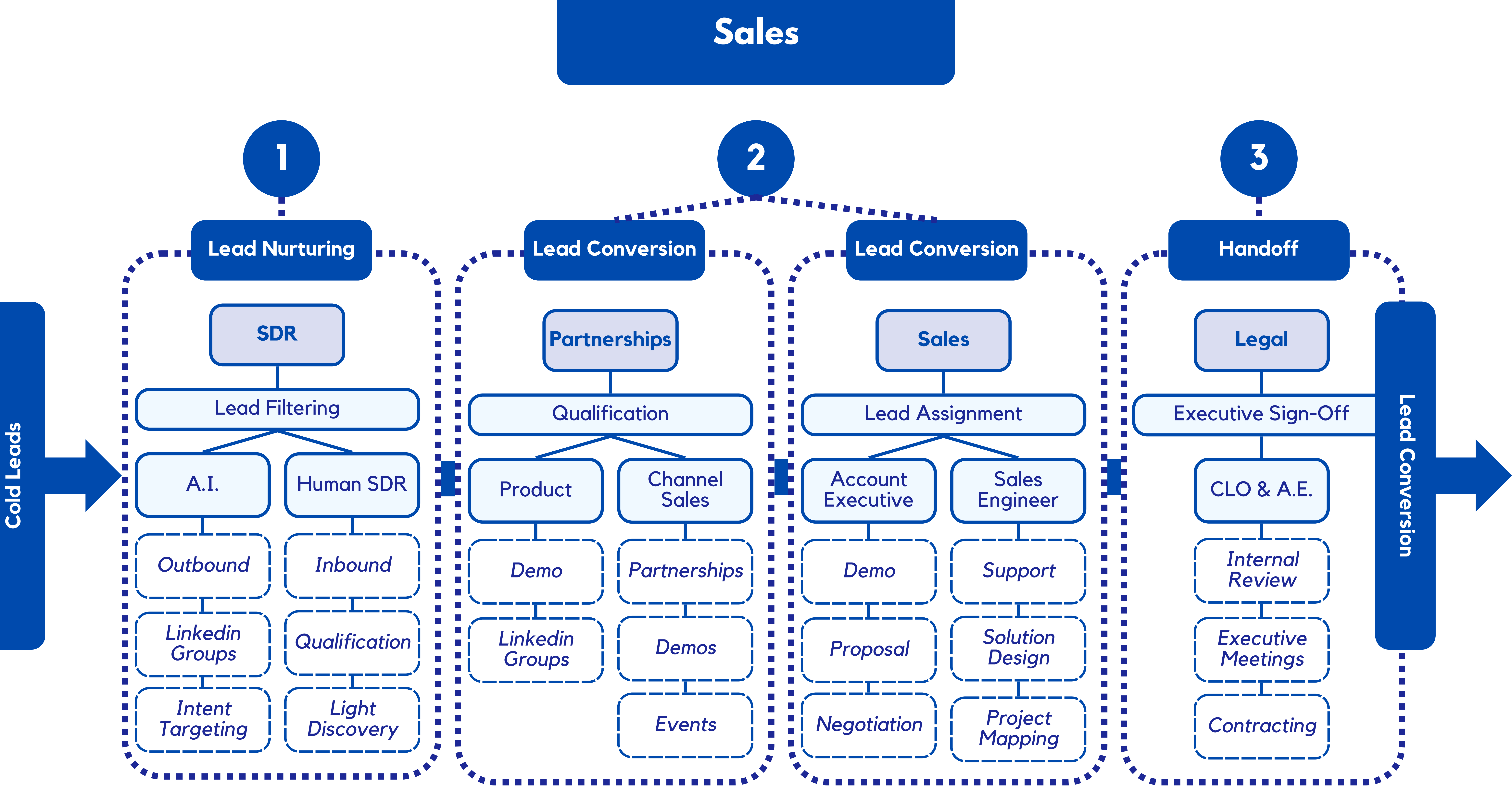
Step 2: Build Org Structures & Identify Core Systems

Figure out how information and resources flow within the organization.
Understand and map out the systems that are core to each department's success.
Refine those systems to create cohesion between and within departments.


Operations
Operations Mgmt
Supply Chain
Procurement
Logistics
Improving Processes
Agile Methods
Workflow Automation
Risk Mgmt
Compliance
Business Continuity
Finance Mgmt
Financial Reporting
Budgeting & Forecasting
Cost Mgmt
Capital Allocation
Sales & Marketing
Lead Generation
Digital Marketing
Brand Optimization
Sales Process
CRM Optimization
Funnel Management
Market Analysis
Competitor Analysis
Competitor Insights
Tech & Innovation
IT Infra
Network Mgmt
Cybersecurity
Data Mgmt
Analytics & Reporting
Data Governance
Innovation Initiatives
R&D Programs
Technology Integration
Human Resources
Recruit & Onboard
Talent Acquisition
Employee Orientation
Performance Mgmt
KPI Tracking
Employee Development
Employee Engagement
Culture Building
Recognition Programs
Service Delivery
Product Dev
Agile Frameworks
Project Mapping
Quality Assurance
Testing & Feedback
Continuous Improvement
Project Mgmt
Timeline Tracking
Resource Allocation
Customer Success
Support
Helpdesk Mgmt
Issue Resolution
Retention
Loyalty Programs
Feedback Loops
Implement & Onboard
Training Programs
User Documents

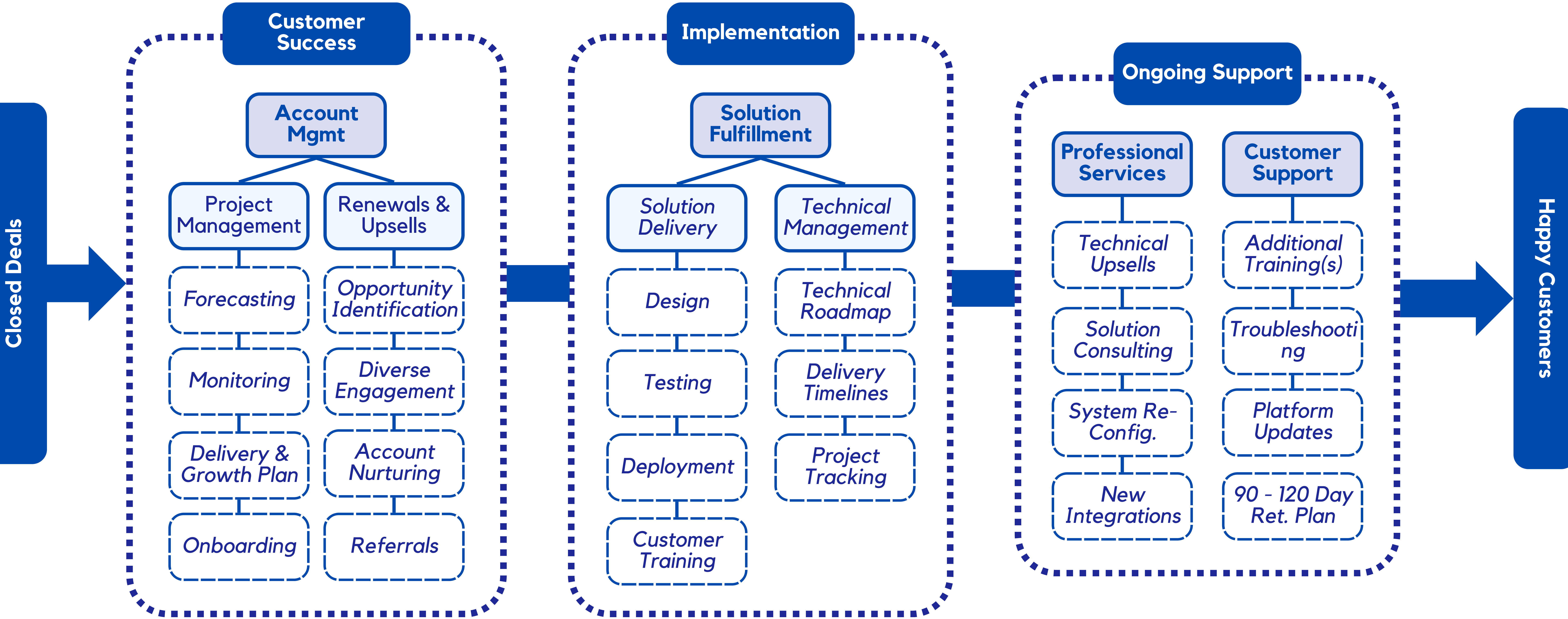

Optimizing Tech Stack
Cross-Departmental
Calendar
Document Collab
Email Mgmt
Communication
File Storage
Strategic Planning
Executive
Executive Dashboards
Operations
ERP Systems
Project Management
Workflow Automation
Supply Chain Management
Finance
Accounting Software
FP&A
Expense Management
Billing and Invoicing
Sales
CRM
Sales Enablement
Sales Analytics
Lead Generation
Marketing
Marketing Automation
Content Mgmt System
Social Media Mgmt
SEO & Analytics
CSM / IM
CS Platforms
Support Ticket Systems
Knowledge Base
Onboarding Tools
Engineering / Product
Version Control
Issue Tracking
Product Mgmt.
Continuous Int. / Dep.
Integrated Dev. Env.
Monitoring & Logging


Marketing
Product
Lead Generation
Creative
Brand
Brand Management
Visual Identity
External Agencies
Design & Visual
Graphic
Multimedia
Photo & Video
External Materials
Templates
Online & Media
Copy & Content
Digital
Social Media
Newsletters
Blogs
Traditional
Print
Broadcast
Events & PR
Campaign Mgmt.
Social Media
Organic
UGC
Brand Partnerships
Community
Newsletter
Discord
SM Engagement
Events
Digital
Webinars
Podcasts
Physical
Fireside Chats
Panels
Conferences
Speaking Engagement



Sales
1
2
3
Lead Nurturing
Lead Conversion
Lead Conversion
Handoff
Cold Leads
SDR
Lead Filtering
A.I.
Human SDR
Outbound
Inbound
Linkedin Groups
Qualification
Intent Targeting
Light Discovery
Partnerships
Qualification
Product
Channel Sales
Demo
Partnerships
Linkedin Groups
Demos
Events
Sales
Lead Assignment
Account Executive
Sales Engineer
Demo
Support
Proposal
Solution Design
Negotiation
Project Mapping
Legal
Executive Sign-Off
CLO & A.E.
Internal Review
Executive Meetings
Contracting
Lead Conversion

Lead to Customer Transition



Step 3: Develop Scalable Processes & Build Replicable Procedures

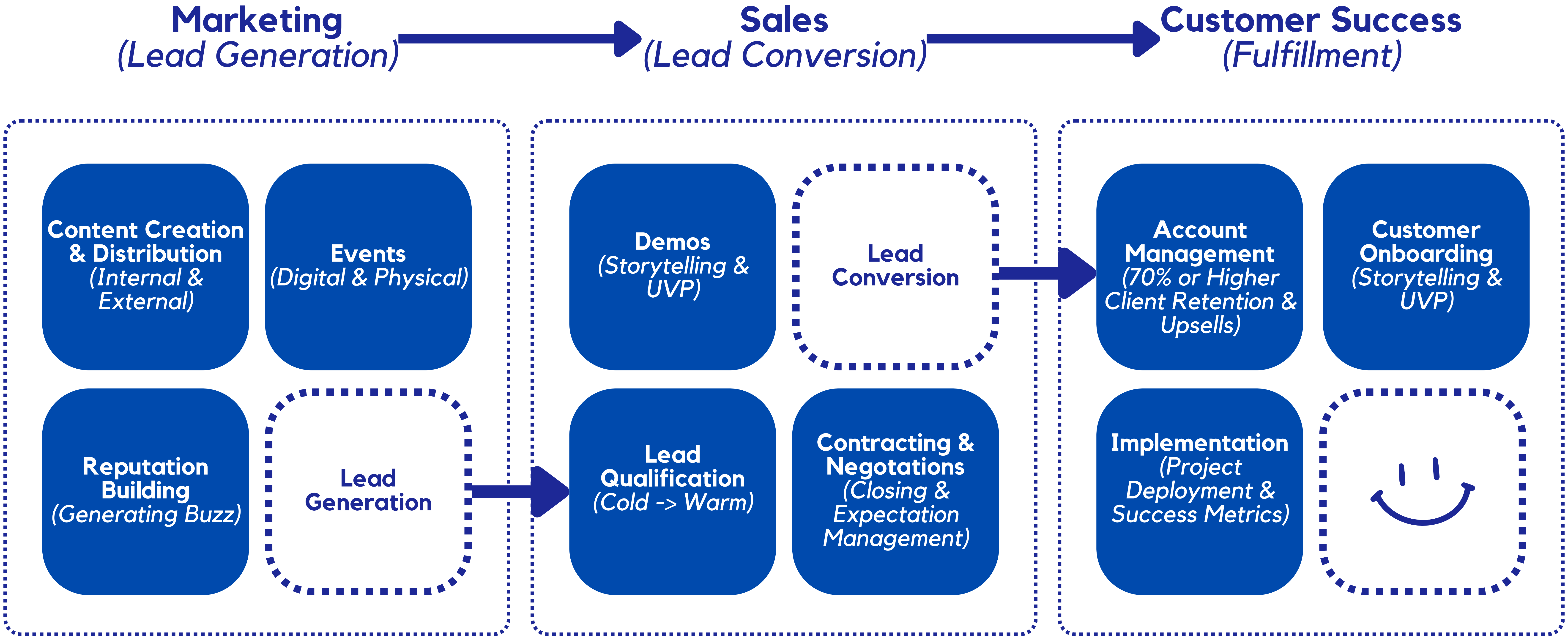
Now that we understand what systems are core to each department, let's get a little more into the weeds. Each system is comprised of strategic processes and tactical procedures. Map, refine, and document them. Establish replicable best practices.

Universal Sales Life Cycle

Marketing *(Lead Generation)* → **Sales** *(Lead Conversion)*

SDR Qualification (Hook)	1. Piquing Process	Events, Social Media, Intent Data, SDR Outreach
	2. Qualification Process	MEDDPICC Methodology
AE Sale (Story)	3. Demo-Requesting Process	High-Touch (8-12 Contacts), Personalized + A.I., Progressive Escalation
	4. Demo Process	Account Executive + Sales Engineer
Executive Support As Needed (Offer)	5. Package / Product Selection	Automated Pricing & Defined Sales Packages
	6. Negotiations & Contracting	Executive Escalations As Necesssary & Legal
	7. Project Handoff & Receivables	Implementation Team & Sales Handshake

Revenue Machine



Lead Generation

Account Triggers

Persona Triggers

Activation

Outbound: Intent-Based

6Sense + LSN:
Consideration, Decision, & Purchase Stage

Hiring Growth by Persona %
Headcount Growth by Persona %
Warm Intros by Persona %
Funding
Lost & Derailed Opportunities

A.I. Based Project Identification (Perplexity)

Former Customers
Investor Introductions
Executive Team Link Connections
New Hires

Omni-Channel (Phone, Linkedin, Email)

Investor Tracker and Ghost Emails

Director +

10+ Contacts, Across 3+ Departments

Decision Stage

Consideration Stage

High Touch + Personalized

Medium Touch + A.I. Based

Linkedin ABM

Outbound: Targeted

Trigger Event or Needs-Based Targeting:
6th Sense + Tiering

Compelling Events
Regulatory Changes
Known Customer Problems

A.I. Based Project Identification (Perplexity)

Linkedin Groups
Targeted Buyer Personas
Multi-Threaded Title Outreach

Omni-Channel (Phone, Linkedin, Email)

Investor Tracker and Ghost Emails

Director +

10+ Contacts, Across 3+ Departments

Decision Stage

Consideration Stage

High Touch + Personalized

Medium Touch + A.I. Based

Linkedin ABM

Inbound

ABM Campaigns
Evergreen Campaigns
Regulatory Campaigns
Event-Based Campaigns

Former Customers
Investor Introductions
Executive Team Link Connections
New Hires

Chili Piper Lead Routing

SDR Omni-Channel Outreach

Marketing Collateral

Linkedin ABM

Artificial Intelligence SDR Reps

Intent

Contract Sourcing & Reach Outs

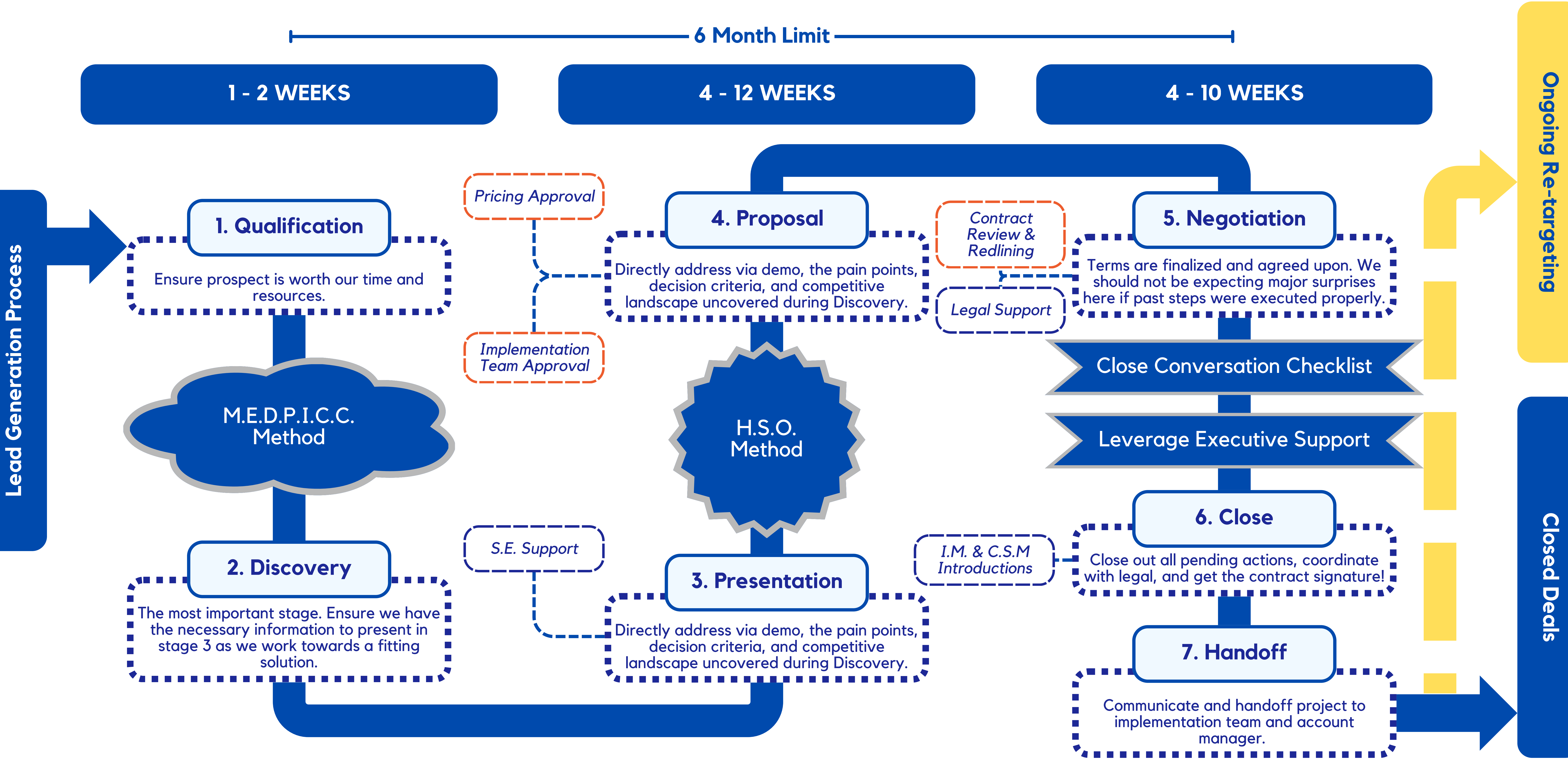
Live SDR Followup - Hot Accounts

Linkedin ABM

Lead Qualification

M	METRIC	Establish record of the quantifiable measures of value that our solution can provide.
E	ECONOMIC BUYER	Determine the person, people, or group that has the overall authority in the buying decision.
D	DECISION CRITERIA	Determine the various criteria in which a decision to progress with our solution will be judged.
D	DECISION PROCESS	The series of steps that fom a process which the buyer will follow to go from making an evaluation to making a decision.
P	PAPER PROCESS	The series of steps that follow the decision process, which will lead from a decision to a signed contract.
I	IMPLICATE PAIN	Identify, indicate, and implicate the pain our solution solves for the prospect.
C	CHAMPION	Person who has power, influence, and credibility within the prospect's organization who will sell internally on our behalf.
C	COMPETITION	Any person, vendor, or initiative that is competing for the same funds or resources that we are.

Lead Conversion



The **CLOSE** Conversation Checklist

1

CHALLENGE

What challenges do prospects need to tackle?

- Help uncover challenges the buyer may not realize or understand the implications.
- Illustrate the seriousness of the challenges with compelling commercial interests.
- Communicate how the challenge manifests. Use customer use cases to paint a picture of the status quo.

2

OPPORTUNITY COST

What costs are associated with these challenges?

- Quantify "cost of doing nothing". Tally these expenses as:
- *Unnecessary Expenses*
- *Lost Productivity (inefficient or error-prone processes)*
- *Potential Risk & Risk-Related Losses*
- *Lost Revenue or Growth Opportunities*
- *Discuss competition & competitor's edge*

3

OPPORTUNITY

What is the value of addressing the challenge?

- Double down on what the client needs (not nice to haves).
- Tie the impact back to business metrics or value drivers.
- Quantify results as cost savings, improved productivity / process, or reduced risk.
- Communicate business benefits of driving revenue without increased customer acquisition cost (CAC)

4

SOLUTION

What solution best fits the client needs?

- Integrate description of proposed solution into existing client processes.
- Document specific solutions to address the prospect's unique challenge and deliver the proposed benefits.
- Communicate the differentiating components of our solution and features that can impact business value drivers.

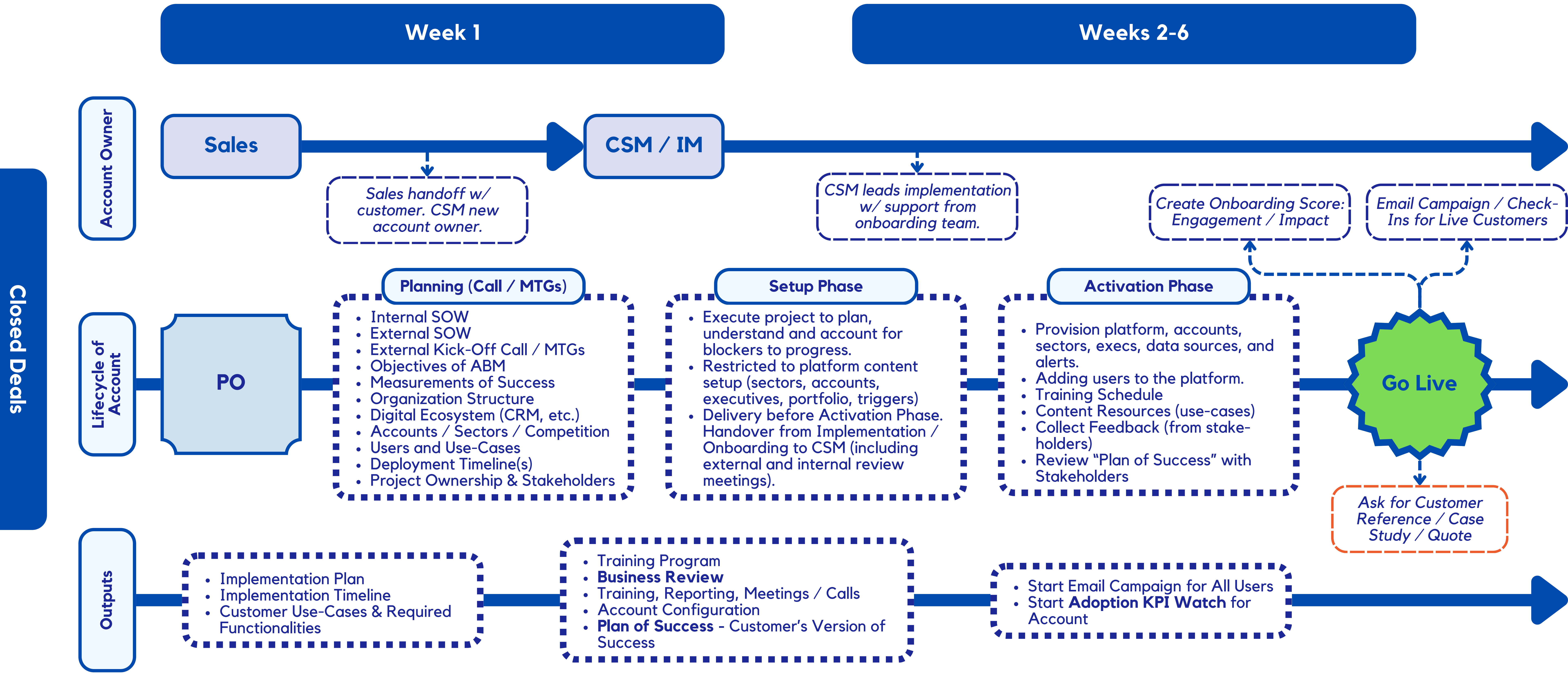
5

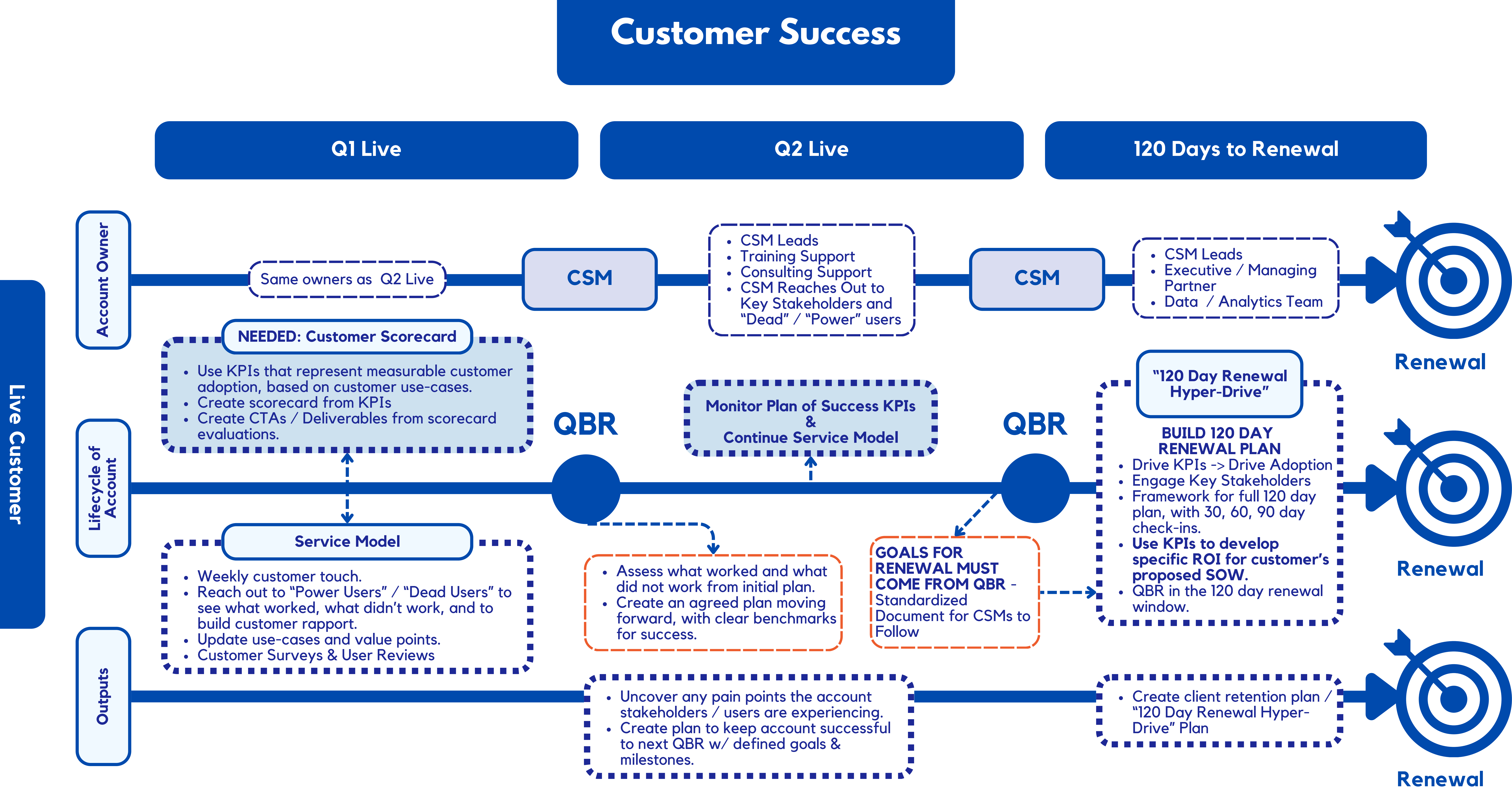
PROOF

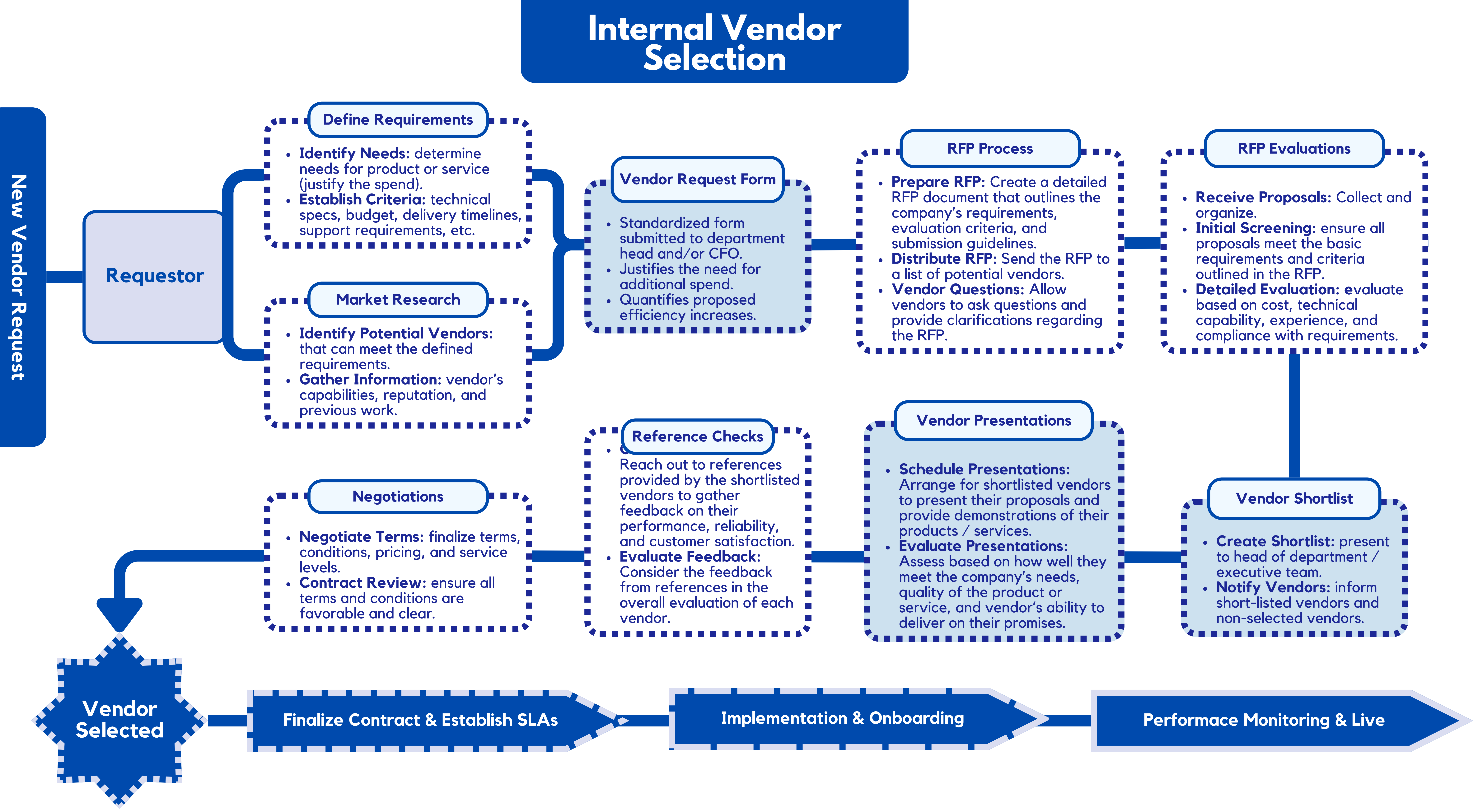
How can you guarantee success with your solution?

- Validate how similar customers have used the proposed solutions(s) successfully and the business value achieved.
- Discuss retention rates of existing clients.
- Quantify specific customer benefits, positive KPI metrics, financial business benefits, and ROI.

Implementation




Customer Success
Q1 Live
Q2 Live
120 Days to Renewal
Live Customer
Account Owner
Lifecycle of Account
Outputs
Same owners as Q2 Live
CSM
• CSM Leads
• Training Support
• Consulting Support
• CSM Reaches Out to Key Stakeholders and "Dead" / "Power" users
CSM
• CSM Leads
• Executive / Managing Partner
• Data / Analytics Team
Renewal
NEEDED: Customer Scorecard
• Use KPIs that represent measurable customer adoption, based on customer use-cases.
• Create scorecard from KPIs
• Create CTAs / Deliverables from scorecard evaluations.
QBR
Monitor Plan of Success KPIs & Continue Service Model
QBR
"120 Day Renewal Hyper-Drive"
BUILD 120 DAY RENEWAL PLAN
• Drive KPIs -> Drive Adoption
• Engage Key Stakeholders
• Framework for full 120 day plan, with 30, 60, 90 day check-ins.
• Use KPIs to develop specific ROI for customer's proposed SOW.
• QBR in the 120 day renewal window.
Renewal
Service Model
• Weekly customer touch.
• Reach out to "Power Users" / "Dead Users" to see what worked, what didn't work, and to build customer rapport.
• Update use-cases and value points.
• Customer Surveys & User Reviews
• Assess what worked and what did not work from initial plan.
• Create an agreed plan moving forward, with clear benchmarks for success.
GOALS FOR RENEWAL MUST COME FROM QBR - Standardized Document for CSMs to Follow
• Uncover any pain points the account stakeholders / users are experiencing.
• Create plan to keep account successful to next QBR w/ defined goals & milestones.
• Create client retention plan / "120 Day Renewal Hyper-Drive" Plan
Renewal



Internal Vendor Selection
New Vendor Request
Requestor
Define Requirements
• Identify Needs: determine needs for product or service (justify the spend).
• Establish Criteria: technical specs, budget, delivery timelines, support requirements, etc.
Market Research
• Identify Potential Vendors: that can meet the defined requirements.
• Gather Information: vendor's capabilities, reputation, and previous work.
Vendor Request Form
• Standardized form submitted to department head and/or CFO.
• Justifies the need for additional spend.
• Quantifies proposed efficiency increases.
RFP Process
• Prepare RFP: Create a detailed RFP document that outlines the company's requirements, evaluation criteria, and submission guidelines.
• Distribute RFP: Send the RFP to a list of potential vendors.
• Vendor Questions: Allow vendors to ask questions and provide clarifications regarding the RFP.
RFP Evaluations
• Receive Proposals: Collect and organize.
• Initial Screening: ensure all proposals meet the basic requirements and criteria outlined in the RFP.
• Detailed Evaluation: evaluate based on cost, technical capability, experience, and compliance with requirements.
Vendor Shortlist
• Create Shortlist: present to head of department / executive team.
• Notify Vendors: inform short-listed vendors and non-selected vendors.
Vendor Presentations
• Schedule Presentations: Arrange for shortlisted vendors to present their proposals and provide demonstrations of their products / services.
• Evaluate Presentations: Assess based on how well they meet the company's needs, quality of the product or service, and vendor's ability to deliver on their promises.
Reference Checks
• Reach out to references provided by the shortlisted vendors to gather feedback on their performance, reliability, and customer satisfaction.
• Evaluate Feedback: Consider the feedback from references in the overall evaluation of each vendor.
Negotiations
• Negotiate Terms: finalize terms, conditions, pricing, and service levels.
• Contract Review: ensure all terms and conditions are favorable and clear.
Vendor Selected
Finalize Contract & Establish SLAs
Implementation & Onboarding
Performace Monitoring & Live