

## Go To Market Plan Templates

### Introduction

Go To Market (GTM) Plan templates for each type of partnership or business configuration are provided. These templates are to guide the operationalization of your partnership. Partners can use their respective organization's GTM template. Please be sure to include all sections within this provided template within your organization's GTM template.

### Templates

- [Lead Generation](#)
- [Cross-Marketing/Cross-Selling](#)
- [Co-Marketing/Co-Selling](#)

## Co-Marketing/Co-Selling or Bundled Offerings Template

### Executive Summary

- Objective: Outline the purpose and goals of the partnership.
- Partnership Overview: Briefly describe the co-bundled offering/s (i.e. what you will provide) followed by each organizations contribution:
- Organization A (High Quality Instructional Materials Provider): Describe the educational resources to K12 school districts.
- Organization B (Professional Learning Services Provider): Describe the professional development and training services to educators in K12 districts.
- Target Market: Major K12 school districts in key geographical areas.

### Market Analysis

Create a shared understanding of the market based on review and analysis of each partner's market analysis.

- Industry Overview:
  - Describe the current trends in K12 education.
  - Outline the demand for instructional materials and professional development.
- Competitive Analysis:
  - List the key competitors in the instructional materials and professional learning services markets.
  - Describe the unique value propositions of each organization.
- Customer Needs:
  - Describe the educational challenges and priorities in major K12 districts.
  - Identify pain points related to instructional materials and teacher training.

### Target Market & Segmentation

Create a shared understanding of who the target market is for the partnership.

- Ideal Customer Profile (ICP):
  - Describe the district size, budget, current educational needs, previous use of instructional materials, and professional development services.
  - Note the different sizes of the school districts (large, medium, small).
- Key Stakeholders (District administrators, curriculum directors, principals, and

teachers):

- Identify users of the co-bundled offering.
  - Identify influencers in purchasing products and services
  - Identify buyers of products and services
- Market Segments: Name state and regions prioritized for sales and marketing of the bundled services.
  - California
    - Northern California
    - Bay Area
    - Central Valley
    - Central Coast
    - Inland Empire
    - Southern California
  - Texas
    - North Texas (DFW)
    - Central Texas (Austin/San Antonio)
    - East Texas
    - West Texas
    - Gulf (Houston metro)
    - Panhandle
    - Rio Grande Valley
  - New York
    - NYC
    - Other Big 5 districts
      - Buffalo
      - Rochester
      - Syracuse
      - Yonkers
  - Florida
    - Panhandle
    - North Florida
    - Central Florida
    - Tampa Bay
    - Treasure Coast
    - Southwest Florida
    - South Florida

## Value Proposition

Create a shared understanding of the value of the partnership for districts and each partner organization.

- Value of Business Configuration
  - Describe how the co-bundled instructional materials and professional learning services complement each other to increase value in the market over the individual sales and marketing of instructional materials and professional learning services.
- Benefits to Schools:
  - Describe how student outcomes will be improved through the partnership.
  - Describe how the professional growth for educators will lead to higher retention and satisfaction through the partnership.
  - Describe how the procurement complexity will be reduced through the partnership.
- Unique Selling Points (USPs):

Articulate the unique selling points of the bundled offering.

## Go-to-Market Strategy

Create a shared strategy for how the partnership will go to market.

- Product Positioning:
  - Describe how the partnership will collectively position the partnership in the market.
- Pricing Strategy:
  - Describe the pricing strategy of the co-bundled offerings (materials and services).
  - Describe any potential revenue sharing agreements for the partnership.
- Partnership Roles & Responsibilities: Describe each respective organization's role and responsibility within the co-marketing/co-selling partnership.
  - Publisher:
  - PI Provider:
- Sales Strategy:
  - Describe how each organization's sales teams will collaborate to create leads identifying key accounts and decision-makers.
- Marketing Strategy:
  - Describe how each organization's marketing teams will collaborate to generate leads (e.g., co-branded marketing materials, campaigns, joint

webinars, case studies, and success stories)

- Channels:
  - Describe the channels that might be used for marketing and sales for the co-marketing/co-selling partnership (e.g, direct sales, educational conferences, district RFPs, and digital marketing).

## Implementation Plan

Create an implementation plan for co-marketing and co-selling that minimally includes the following components:

- Pilot Programs:
  - Identify 3-5 key districts to co-market and co-sell the bundled offering.
- Timeline:
  - Describe any milestones for co-marketing and co-selling including start dates, specific marketing and sales activities and pilot completion.
- Resource Allocation:
  - Describe the dedicated marketing and sales teams from both organizations and/or a joint sales and marketing teams.
- Marketing & Sales Enablement and Support:
  - Describe joint training sessions and other supports needed for sales and marketing teams to support co-marketing and co-selling in both organizations.

## Measurement & KPIs

Collectively determine key performance indicators and measures of those indicators for the co-marketing/co-selling partnership.

- Sales KPIs:
  - How many districts will be engaged?
  - How many deals closed?
  - How much revenue will be generated?
- Customer Success KPIs:
  - What will be your measurable indicator of customer satisfaction?
  - What are your target retention rates for districts?
  - What is the targeted impact on teacher knowledge and practice?
  - What is the targeted impact on student outcomes?
- Marketing KPIs:

- What is the target for leads generated?
- What is the level of engagement from the target audience?
- What is the level of engagement with the website from each partner organization?
- What is the targeted conversion rate?

## **Risk Assessment & Mitigation**

Describe strategies for how you will collaboratively maintain a successful partnership.

- Potential Risks (e.g., misalignment between the two organizations, market resistance or competition):
- Mitigation Strategies (eg. regular alignment meetings, contingency plans for competitive response):

## **Partnership Governance**

Describe the strategies for how you will collaboratively communicate and govern the partnership.

- Communication Plan (e.g., regular meetings, reporting cadence, key contacts):
- Conflict Resolution (e.g., process for handling disagreements and ensuring smooth collaboration):

## **Appendices**

- Market Research Data:
- Customer Personas:
- Detailed Sales Playbook:

## Lead Generation Template

### Executive Summary

Outline the purpose and goals of the partnership.

- Partnership Overview: Briefly describe the roles of each organization:
  - Organization A (High Quality Instructional Materials Provider): Supplies educational resources to K12 school districts.
  - Organization B (Professional Learning Services Provider): Offers professional development and training services to educators in K12 districts.
- Target Market: List major K12 school districts in key geographical areas.

### Market Analysis

Create a shared understanding of the market based on review and analysis of each partner's market analysis.

- Industry Overview:
  - Describe the current trends in K12 education.
  - Outline the demand for instructional materials and professional development.
- Competitive Analysis:
  - List the key competitors in the instructional materials and professional learning services markets.
  - Describe the unique value propositions of each organization.
- Customer Needs:
  - Describe the educational challenges and priorities in major K12 districts.
  - Identify pain points related to instructional materials and teacher training.

### Target Market & Segmentation

Create a shared understanding of who the target market is for the partnership.

- Ideal Customer Profile (ICP):
  - Describe the district size, budget, current educational needs, previous use of instructional materials, and professional development services.
  - Note the different sizes of the school districts (large, medium, small).

- Key Stakeholders (District administrators, curriculum directors, principals, and teachers):
  - Identify users of the products and services
  - Identify influencers in purchasing products and services
  - Identify buyers of the products and services
- Market Segments:

Name state and regions prioritized for sales and marketing:

- California
  - Northern California
  - Bay Area
  - Central Valley
  - Central Coast
  - Inland Empire
  - Southern California
- Texas
  - North Texas (DFW)
  - Central Texas (Austin/San Antonio)
  - East Texas
  - West Texas
  - Gulf (Houston metro)
  - Panhandle
  - Rio Grande Valley
- New York
  - NYC
  - Other Big 5 districts
    - Buffalo
    - Rochester
    - Syracuse
    - Yonkers
- Florida
  - Panhandle
  - North Florida
  - Central Florida
  - Tampa Bay
  - Treasure Coast
  - Southwest Florida
  - South Florida



## Value Proposition

Create a shared understanding of the value of the partnership for districts and each partner organization.

- Value of Business Configuration
  - Describe how the instructional materials and professional learning services complement each other to drive Lead Generation.
- Benefits to Schools:
  - Describe how student outcomes will be improved through the partnership.
  - Describe how the professional growth for educators will lead to higher retention and satisfaction through the partnership.
  - Describe how the procurement complexity will be reduced through the partnership.
- Unique Selling Points (USPs):

Articulate the unique selling points of each of the partnerships.

## Go-to-Market Strategy

Create a shared strategy for how the partnership will go to market.

- Product Positioning:
  - Describe how the partnership will collectively position the partnership in the market.
- Pricing Strategy:
  - Describe the pricing strategy of each partner's respective offerings (materials and services) within the partnership.
  - Describe any potential revenue sharing agreements for the Lead Generation partnership.
- Partnership Roles & Responsibilities:
- Describe each respective organization's role and responsibility within the Lead Generation partnership.
  - Publisher:
  - PI Provider:
- Sales Strategy:
  - Describe how each organization's sales teams will collaborate to create leads identifying key accounts and decision-makers.
- Marketing Strategy:

- Describe how each organization's marketing teams will collaborate to generate leads (e.g., co-branded marketing materials, campaigns, joint webinars, case studies, and success stories)
- Channels:
  - Describe the channels that might be used for marketing and sales for the Lead Generation partnership (e.g, direct sales, educational conferences, district RFPs, and digital marketing).

## Measurement & KPIs

Collectively determine key performance indicators and measures of those indicators for the Lead Generation Partnership.

- Sales KPIs:
  - How many districts will be engaged?
  - How many deals closed?
  - How much revenue will be generated?
- Customer Success KPIs:
  - What will be your measurable indicator of customer satisfaction?
  - What are your target retention rates for districts?
  - What is the targeted impact on teacher knowledge and practice?
  - What is the targeted impact on student outcomes?
- Marketing KPIs:
  - What is the target for leads generated?
  - What is the level of engagement from the target audience?
  - What is the level of engagement with the website from each partner organization?
  - What is the targeted conversion rate?

## Risk Assessment & Mitigation

Describe strategies for how you will collaboratively maintain a successful partnership.

- Potential Risks (e.g., misalignment between the two organizations, market resistance or competition):
- Mitigation Strategies (eg. regular alignment meetings, contingency plans for competitive response):

## Partnership Governance

Describe the strategies for how you will collaboratively communicate and govern the partnership.

- Communication Plan (e.g., regular meetings, reporting cadence, key contacts):
- Conflict Resolution (e.g., process for handling disagreements and ensuring smooth collaboration):

## Appendices

Please attach.

- Market Research Data:
- Customer Personas:
- Detailed Sales Playbook:

## Cross-Marketing/Cross-Selling Template

### Executive Summary

Outline the purpose and goals of the partnership.

- Partnership Overview: Briefly describe the roles of each organization:
  - Organization A (High Quality Instructional Materials Provider): Supplies educational resources to K12 school districts.
  - Organization B (Professional Learning Services Provider): Offers professional development and training services to educators in K12 districts.
- Target Market: Major K12 school districts in key geographical areas.

### Market Analysis

Create a shared understanding of the market based on review and analysis of each partner's market analysis.

- Industry Overview:
  - Trends in K12 education.
  - Demand for instructional materials and professional development.
- Competitive Analysis:
  - Key competitors in the instructional materials and professional learning services markets.
  - Unique value propositions of each organization.
- Customer Needs:
  - Educational challenges and priorities in major K12 districts.
  - Pain points related to instructional materials and teacher training.

### Target Market & Segmentation

Create a shared understanding of who the target market is for a Cross-Selling/Cross Marketing partnership.

- Ideal Customer Profile (ICP) for Cross-Selling/Cross Marketing (CrS/CrM):
  - District size, budget, current educational needs, previous use of instructional materials, and professional development services.
  - Note district size (large, medium, small)

- Key Stakeholders:
  - District administrators, curriculum directors, principals, and teachers.
- Market Segments:
  - California
    - Northern California
    - Bay Area
    - Central Valley
    - Central Coast
    - Inland Empire
    - Southern California
  - Texas
    - North Texas (DFW)
    - Central Texas (Austin/San Antonio)
    - East Texas
    - West Texas
    - Gulf (Houston metro)
    - Panhandle
    - Rio Grande Valley
  - New York
    - NYC
    - Other Big 5 districts
      - Buffalo
      - Rochester
      - Syracuse
      - Yonkers
  - Florida
    - Panhandle
    - North Florida
    - Central Florida
    - Tampa Bay
    - Treasure Coast
    - Southwest Florida
    - South Florida

## Value Proposition

Create a shared understanding of the value of the partnership for districts and each partner organization.

- Value of Business Configuration
  - Describe how the instructional materials and professional learning services complement each other to enable Cross-Marketing/Cross Selling
- Benefits to Schools:
  - Describe how student outcomes will be improved through Cross-marketing/Cross-Selling quality instructional materials and professional learning services.
  - Describe how cross-marketing/ cross-selling will result in professional growth for educators that leads to higher educator retention and satisfaction.
  - Describe how cross-marketing/ cross-selling will reduced procurement complexity
- Unique Selling Points (USPs):
  - Articulate the unique selling points of each of the partnerships.

## Go-to-Market Strategy

Create a shared strategy for how the partnership will go to market for cross-selling/cross-marketing.

- Product Positioning:
  - Describe how the partnership will collectively position the partnership in the market.
- Pricing Strategy:
  - Describe the pricing strategy of each partner's respective offerings (materials and services) within the partnership.
  - Describe any potential revenue sharing agreements for the Lead Generation partnership.

- Partnership Roles & Responsibilities:

Describe each respective organization's role and responsibility with the cross-marketing/ cross-selling partnership

- Organization A:
  - Organization B:
- Sales Strategy:
  - Describe how each organization's sales team will collaborate to cross sell inclusive of identifying key accounts and decision makers.
- Marketing Strategy:

- Describe how each organization's marketing teams will collaborate to cross market (e.g., co-branded marketing materials, campaigns, joint webinars, case studies, and success stories)
- Channels:
  - Describe the channels that might be used for marketing and sales for the cross-marketing/ cross-selling partnership (e.g., direct sales, educational conferences, district RFPs, and digital marketing)

## Implementation Plan

Create an implementation plan for cross marketing and cross selling that minimally includes the following components:

- Pilot Programs:
  - Identify 3-5 key districts to cross market and cross sell products and services.
- Timeline:
  - Describe any milestones for cross marketing and cross selling including start dates, specific marketing and sales activities and pilot completion.
- Resource Allocation:
  - Describe the dedicated marketing and sales teams from both organizations.
- Marketing & Sales Enablement and Support:
  - Describe joint training sessions and other supports needed for sales and marketing teams to support cross marketing and cross selling in both organizations.

## Measurement & KPIs

Collectively determine key performance indicators and measures of important indicators for the cross marketing/cross selling partnerships.

- Sales KPIs:
  - How many districts will be targeted/engaged for cross-marketing/ cross-selling?
  - How many deals closed as a result of the partnership?
  - How much revenue will be generated?
- Customer Success KPIs:
  - What will be your measurable indicator of customer satisfaction?

- What are your target retention rates for districts?
  - What is the targeted impact on teacher knowledge and practice?
  - What is the targeted impact on student outcomes?
- Marketing KPIs:
  - What is the target for leads generated?
  - What is the level of engagement from the target audience?
  - What is the level of engagement with the website from each partner organization?
  - What is the targeted conversion rate?

## **Risk Assessment & Mitigation**

- Potential Risks (e.g., misalignment between the two organizations, market resistance or competition.)
- Mitigation Strategies (e.g., regular alignment meetings, contingency plans for competitive response).

## **Partnership Governance**

Describe the strategies for how you will collaboratively communicate and govern the partnership.

- Communication Plan (e.g., regular meetings, reporting cadence, and key contacts)
- Conflict Resolution (e.g., processes for handling disagreements and ensuring smooth collaboration)

## **Appendices**

Please attach.

- Market Research Data:
- Customer Personas:
- Detailed Sales Playbook: