

# From Undifferentiated Growth to Precision Value Targeting

CMO – GROWTH & BRAND LEADERSHIP

STRATEGIC PROOF

A B2B manufacturing company with a broad customer base was experiencing steady revenue growth—but declining profitability and weak customer differentiation. Growth lacked quality, marketing spending declined, and sales efforts were misaligned with value creation. This is the story of how Fortis & Peak transformed that trajectory.

# The Executive Challenge

## STRATEGIC PROBLEM

The organization lacked a value-based customer model. Segmentation was based on industry or geography—not profitability. There was no linkage between customer behavior and margin contribution, and uniform pricing and service models were applied across all segments. Marketing and sales were not aligned with target customers. The result was stark: **revenue increased—but value creation did not.**

## The Core Question

How can the CMO drive profitable growth by focusing on the right customers—and aligning the organization around value, not volume?

## Key Challenges

- Treating all customers similarly, regardless of value contribution
- High acquisition and servicing costs across low-margin segments
- Limited visibility into true customer profitability
- Generic go-to-market approach with weak positioning

# The Fortis & Peak Intervention

Fortis & Peak deployed a five-part intervention designed to rebuild the organization's commercial model from the ground up—anchored in customer profitability, not volume. Each workstream was sequenced to build on the last, creating a compounding effect across marketing, sales, pricing, and operations.

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## Customer Profitability Segmentation

Developed a multi-dimensional model based on revenue, margin contribution, cost-to-serve, and growth potential—identifying high-value, margin-dilutive, and strategic growth accounts.

02

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## Value-Based Targeting Strategy

Prioritized high-margin and high-potential segments, defined tailored value propositions for each, and aligned marketing and sales around targeted growth pockets.

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## Pricing & Offer Differentiation

Introduced segment-specific pricing strategies, adjusted service levels based on profitability, and eliminated unprofitable offerings and contracts.

04

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## Go-to-Market Realignment

Redesigned sales coverage models, focused resources on high-value accounts, and optimized channel strategy for different segments.

05

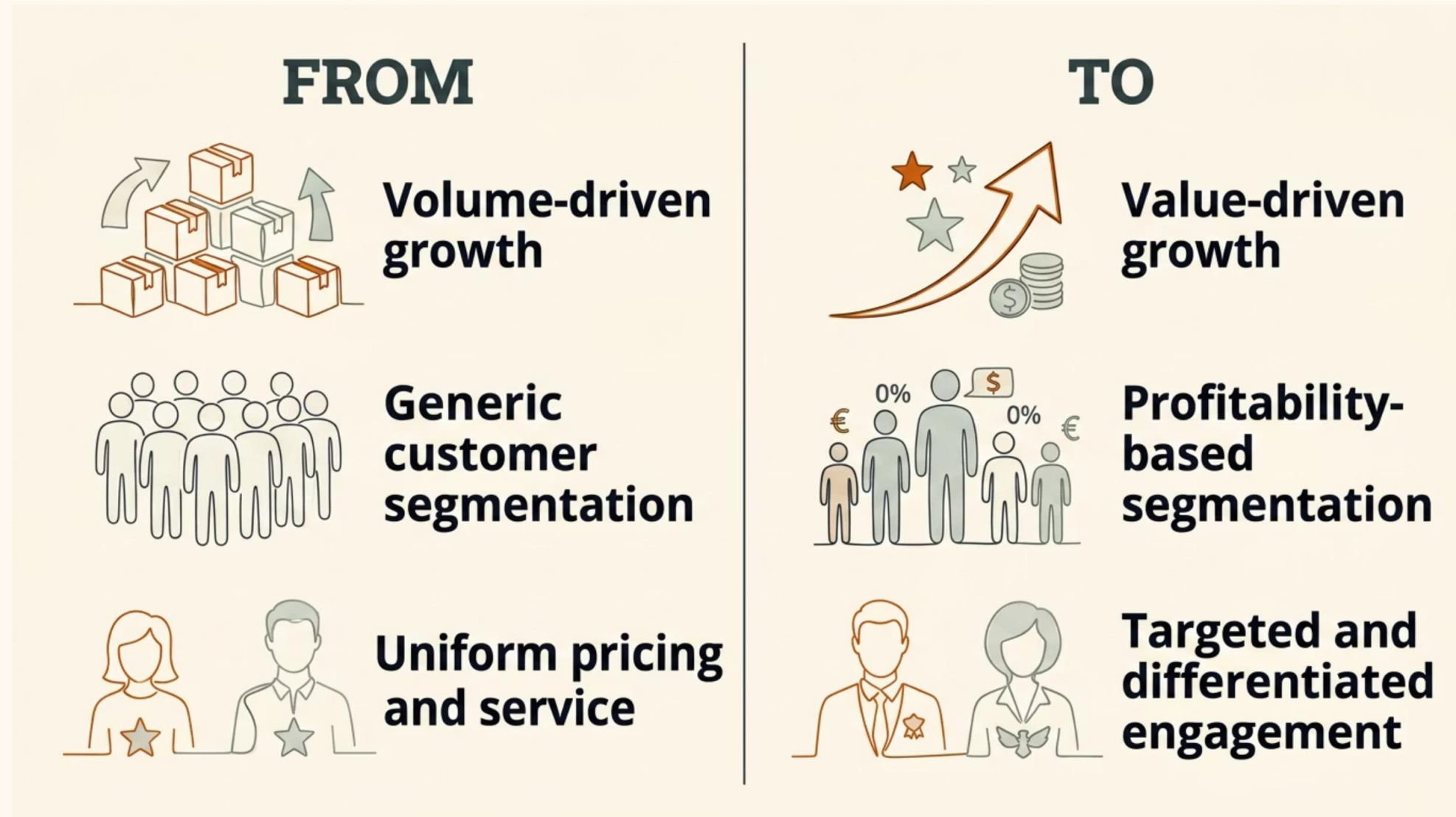
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## Data & Execution Enablement

Integrated customer data across CRM, finance, and operations—enabling real-time visibility into customer profitability and establishing KPIs for segment performance tracking.

# The Transformation Approach

The shift was not incremental—it was a fundamental reorientation of how the organization defined and pursued growth. Every commercial function was realigned around a single principle: **value creation over volume generation**.



This transformation required not just strategic redesign but organizational alignment—ensuring that marketing, sales, finance, and operations were all operating from the same customer value framework.

# Measurable Impact

The results of the Fortis & Peak intervention were concrete and measurable across multiple dimensions of commercial performance. Profitability improved at the customer level, marketing efficiency increased substantially, and the organization's exposure to low-margin segments was meaningfully reduced.

+8–12%

## Customer Profitability

Improvement in customer-level profitability across targeted segments.

20%

## Marketing ROI

Increase in marketing return on investment following go-to-market realignment.



## Conversion Rates

Higher conversion rates achieved in precisely targeted, high-value segments.

- ✔ Improved alignment between marketing, sales, and finance—with reduced low-margin customer exposure across the portfolio.

# Strategic Outcome


The organization shifted from growing revenue indiscriminately to growing value deliberately. The commercial question at the heart of the business evolved—and with it, the entire operating model.

## The Old Question

"How do we sell more?"

## The New Question

"Where do we create the most value—and how do we win there?"

 **Key Insight:** Not all customers are equal—and treating them as such destroys value.

# How Fortis & Peak Enables CMOs

Fortis & Peak enables CMOs to drive profitable growth by identifying true customer value, aligning segmentation with profitability, and integrating marketing, sales, and financial performance into a unified commercial model.



## Identify True Customer Value

Move beyond revenue metrics to understand margin contribution, cost-to-serve, and long-term growth potential at the individual customer level.



## Align Segmentation with Profitability

Replace geography- or industry-based segmentation with a multi-dimensional model that reflects actual value creation across the customer base.



## Integrate Commercial Performance

Unify marketing, sales, and financial data to enable real-time decision-making and sustained alignment across the organization.

Growth Is About Winning the Right Customers

Growth is not about reaching more customers—it is about winning the right ones.

Fortis & Peak Consulting & Investment combines the rigor of top-tier advisory with a distinctly hands-on approach—translating strategy into measurable performance, operational discipline, and scalable execution. We engage selectively with organizations that seek clarity at the top, precision in execution, and results that endure well beyond the engagement.

Operations & Efficiency

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