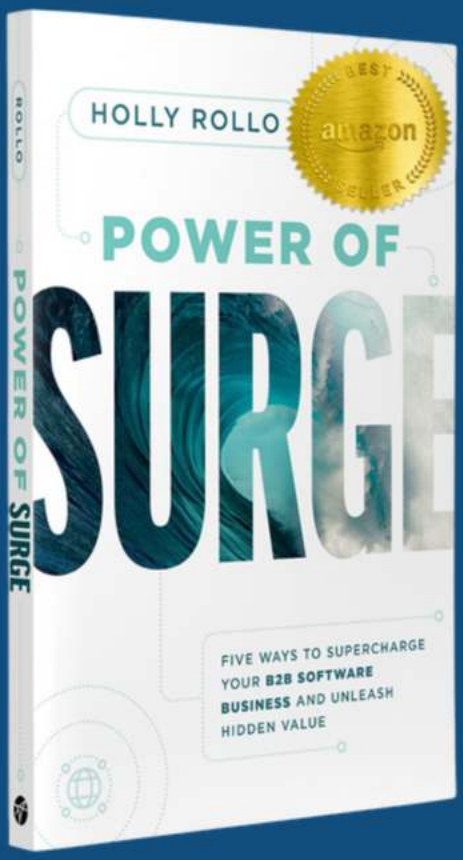
SURGE

CMO CHALLENGE



BASED ON
THE BEST SELLING BOOK

Invest in Your High Potential Talent

Accelerate CMO Strategic Leadership Skills

Improve ROI on Marketing Initiatives

Drive GTM Performance Internally

Create Future-Ready Skills

Discover Ways to Unlock Hidden Value

BUSINESS CASE

WHAT IS THE SURGE CHALLENGE?

AN 8 WEEK CMO DEVELOPMENT & COACHING ACCELERATOR

This program is for B2B marketing leaders who aspire to drive higher levels of alignment, results, and valuation within their organizations. It's most specifically designed for marketing and GTM leaders in small- to mid-sized companies in B2B software.

- **B2B Software or Software-Based Services**
- **Aspiring CMOs**
- **New CMOs**
- **CMOs in Transition**
- **CROs or Growth Officers**

OUTCOMES

Learn proven methods that elevate the strategic value of marketing and drive ROI. This program is designed to give you practical tools to elevate the marketing function in any B2B software business.

Gain transformational leadership skills to help drive and inspire modernization to be AI and future ready. Sometimes knowing what needs to be done is easier than knowing how to get internal alignment and stakeholder buy-in for swift execution.

Adopt best practices from across the B2B Software industry to achieve higher valuation. As you take this journey to get better results, ROI, and recognition, you will have the power to use marketing to unleash hidden value in your company and execute with scale and efficiency.

COST - $1,499 (DISCOUNTS OFFERED FOR GROUPS)

- Eight week collaborative course with materials, exercises, podcasts and book
- Access to elite cohort of peers and group collaboration (space limited)
- Weekly group coaching and case studies, bonus lessons with progression
- 1:1 mentoring and CEO/CMO discussion guides
- Best practice content and frameworks
- Lifetime access to community

BENEFITS TO YOUR COMPANY

Enhanced Strategic Vision

Investing in the training and development of a Chief Marketing Officer can lead to broader and more innovative strategic solutions. This encompasses an advanced understanding of market trends, customer behavior, and competitive dynamics, which can help the CMO lead the company to capitalize on new opportunities and carve out a market leadership position.

Improved ROI on Marketing Initiatives

With continuous learning, a CMO can adopt the latest marketing methodologies and technologies, leading to more efficient and effective marketing campaigns. This could mean better customer targeting, higher conversion rates, and ultimately, a stronger return on investment for all marketing activities.

Stronger Leadership and Team Performance

A well-developed CMO can inspire and lead the marketing team more effectively, fostering a culture of continuous improvement. This can enhance team morale, attract top talent, and improve overall department performance, which is critical for executing successful marketing strategies.

Future-Ready Skill Set

The marketing landscape is constantly evolving with new channels and technologies. Ongoing training ensures that the CMO's skills remain current and relevant, allowing the company to stay ahead of the curve when it comes to innovations such as digital marketing, data analytics, and customer experience management. Better Cross-

Functional Alignment Across the GTM

A CMO who is well-versed in various aspects of the business, including finance, operations, and sales, can collaborate more effectively with other departments. This can lead to more cohesive business strategies, aligning marketing efforts with the company's overall objectives, and driving holistic success.

Higher Probability of Unlocking Hidden Value:

A CMO who can work better cross-functionally and has better business acumen is more likely to deliver a successful transactional outcome and increase the value of the company.

FIVE SURGE PRINCIPLES

1

Strategic Mastery
Gain an in-depth understanding of the fundamental principles that drive success in B2B marketing. Develop strategic thinking methods that position you as a critical business leader within the executive team.

2

Radical Unity
Explore ways you can drive radical unity across products, sales, marketing, and customer success teams. Learn how cohesive collaboration can amplify your impact and contribute to organizational success.

3

Building and Managing Brand Reputation
Understand how to break through to technical and financial stakeholders about the importance of brand reputation and value. Cultivate strategies to gain buy-in for longer-term positioning initiatives and investments.

4

Achieving Gains
Uncover strategies to optimize gains and ROI in your marketing efforts and impress your investors. Learn to measure and communicate the value of marketing initiatives to key stakeholders, and curb the reactive desire to cut marketing budgets or chase shiny objects.

5

Creating Impact & Efficiency
Master the art of leading your company through digital transformation and optimization efforts that reduce friction in the customer experience. Learn how to drive change to streamline processes, enhance productivity, get leverage and scale, cut waste, and drive results.

This challenge is designed for ambitious B2B marketers ready to rise to the occasion, secure a seat at the executive table, and thrive in the competitive world of B2B software marketing. Join us, and let's accelerate your journey to becoming a successful CMO and transformational leader in the ever-evolving realm of strategic marketing.

ADVANTAGES OF DEVELOPMENT HIGH POTENTIAL TALENT VERSUS HIRING FROM THE OUTSIDE

In the event the executive team is determining whether to bring in a new CMO or develop from within, below is cost/benefit analysis of internal development versus taking the time to hire a new CMO.

Cost of Development vs. Recruitment

- Internal Development: The costs include training programs, mentoring, and time spent on development. In this case, the cost of the program and 2-3 hours a week for 8 weeks.

- External Hiring: Costs involve recruitment fees, which can be substantial (~25% of first year compensation) for executives, plus, higher compensation demands. The average time to recruit and onboard a new CMO is typically six months.

Time to Productivity

- Internal Development: An internal executive is likely already familiar with company culture, processes, and staff, which can lead to a quicker transition into the new role.

- External Hiring: An external executive may take more time to reach full productivity as they learn about the new environment and establish relationships; typically three months.

Cultural Fit and Morale

- Internal Development: Promoting from within can boost morale, as it demonstrates a pathway for career progression. The individual is also more likely to embody the company culture.

- External Hiring: New perspectives and experiences can revitalize teams and bring in new expertise. However, it can also lead to cultural mismatches and potentially lower morale among internal candidates who were passed over.

Risk and Innovation

- Internal Development: An internal candidate may carry less risk of turnover but may also be more inclined to maintain the status quo rather than innovate.

- External Hiring: External hires might be more likely to bring fresh ideas and change, but they also carry a higher risk of early exit if they don't integrate well.

ADVANTAGES (CON'T)

Long-Term Value

- Internal Development: Long-term investment in employees can lead to loyalty and retention, with developed leaders deeply invested in the company's success.
- External Hiring: A new executive can make immediate strategic changes that could impact the company's trajectory and valuation, if they come with a well-know reputation.

Succession Planning

- Internal Development: It's a crucial part of succession planning, ensuring business continuity and reducing the risk associated with sudden departures.
- External Hiring: Hiring externally can fill gaps in succession planning, but it might also indicate a lack of effective planning and employee development.

ALTERNATIVE APPROACHES

- **CMO Course:** Universities such as Stanford offer a one-week course for $15,000. It won't cover the depth that this challenge can, and it's specific to the B2B technology and software industry. It's also a hybrid program mixing self-paced learning, weekly huddles, and 1:1 virtual coaching so it's less disruptive to the business.
- **Executive Coaching:** Coaches range in skill and have an hourly rate that can be as high as $700 per hour. They can offer great feedback on leadership, but it isn't geared towards modern marketing best practices with practical playbooks to apply.

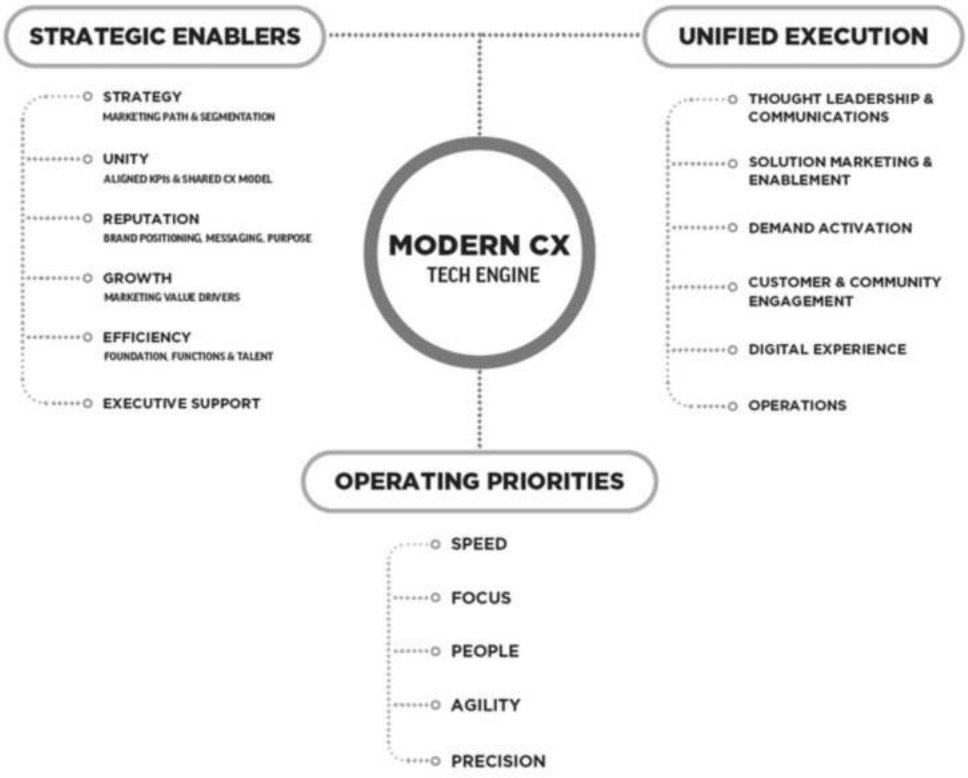
Hiring from outside can carry risks associated with cultural fit, employee morale, and time to impact in addition to it being more costly and take much longer to have a real impact on the business. Developing your marketing talent can be more cost effective, less disruptive, and can offer faster benefits. Of course the best choice depends on the specific circumstances and strategic needs of the organization, but talent development is a great no-risk, no-regret option.

15% GROUP DISCOUNTS OFFERED FOR 3+ PARTICIPANTS

PROMO CODE

15GRP

ELEMENTS OF THE CHALLENGE COVERED



Modern marketing methodology for success.

SECURE A SPOT IN THE NEXT CHALLENGE - SPACE IS LIMITED

PROVEN BEST PRACTICES

Get 30+ years of B2B strategic marketing best practices proven to have transformative impact on any modern, small- to mid-sized software business.

COHORT-BASED LEARNING

You will join a small group of current and aspiring CMOs to learn together and share experiences. Cohorts are kept small to so you get the most out of this great network.

ALL IN YOUR POCKET

This 8 week challenge is delivered through a SURGE app where you can easily access content, videos, templates and the community on the go, or at your desktop.

Visit **www.surge-strategies.com** for more information.

HOLLY ROLLO

SUMMARY

Three decades of transformational leadership experience serving the B2B technology industry from large, complex, multinational environments to early-stage startups and everything in between.

VALUE AT THE TABLE

- Strategic Planning, Product Management, Product Marketing, Customer Experience
- Business Transformation & Pivot to Cloud
- GTM & Product Strategy Transformation
- Strategic Marketing & Brand Repositioning
- Hyper Growth, Rapid Scale, Pre- & Post-Transaction Business Transformation
- Cybersecurity & Risk Management Oversight
- Global Internal Change Management
- Multinationals, Early Stage, Legacy Turnarounds
- Venture Capital & Private Equity Environments
- Diversity Advocate & Thought Leader

INDUSTRY EXPERIENCE

Cloud Computing, Managed Services, Cybersecurity Threat Detection & Response, Integrated Risk Management, Identity & Access Management, Fraud & Risk Intelligence, Enterprise Business Applications (ERP, CRM & HRIS/HCM), Networking, Collaboration, SIEM/Big Data Analytics, Database, Storage, Middleware & Infrastructure, Marketing Technology and Semiconductors.

AUTHOR

POWER OF SURGE: Five Ways to Supercharge Your B2B SaaS Company and Unlock Hidden Value (Available on Amazon)

EXECUTIVE PROFILE

Holly Rollo is a 30-year strategy and GTM veteran in the technology industry with a focus on value creation leading up to transactions. She is a proven transformational leader specialized in repositioning brands and transforming organizations at scale. Holly is currently the CEO & Principal of Surge Strategies, a strategic advisory firm that helps executives, boards and investors lead through major transformations, including digital and cyber disruptions, cloud pivots, workforce transformation, execute new missions, or drive growth.

Ms. Rollo is the former Senior Vice President and Chief Marketing Officer at Dell Technologies/RSA and helped lead the successful carveout to Symphony Technology Group from Dell in 2020. In addition, she also led all aspects of RSAC, a $50M business unit which grew profit 37% the first year under her leadership.

Prior to RSA, Ms. Rollo served as CMO at Fortinet, helping the network security company reach $1B in revenue, and was Chief of Product Strategy and CMO at SumTotal Systems (HCM), a Vista Equity Partners company which was acquired by Skillsoft. She has held leadership positions at FireEye, which grew from $5B to $13B market cap during her tenure; SuccessFactors (HCM), which was acquired by SAP for $3.4B; Cisco leading SME market strategy; and at SAP, where she helped lead the GTM transformation into the SME market with its first cloud-based ERP platform. She spearheaded repositioning for Sybase (BI) leading to its acquisition by SAP (now HANA) for $5.8B, helped drive the utility computing product strategy at Veritas leading into its $13.5B acquisition by Symantec and helped lead post-acquisition corporate development and strategic planning at IBM/Tivoli.

Teams under Ms. Rollo's leadership have been honored to receive awards for Operations Transformation and Global Customer Demand Center Transformation. She has contributed to publications such as Harvard Business Review and Forbes, and has been a mainstage speaker at multiple, large scale industry events. She is a board advisor and contributing lecturer at Santa Clara University Leavey School of Business, is a mentor and advocate for young women in technology and graduated with honors from Santa Clara University.

ADVISORY & BOARD ROLES

- *Member Board of Directors*, **MYOB**, a financial services cloud company in the **KKR** portfolio; *Risk Management & Cyber Security Subcommittee*
- *Strategic Advisor & LP*, **Ballistic Ventures**, a Venture Capital firm focused solely on early-stage cybersecurity
- *PE Board of Advisors*, **Livingbridge** and **FFL Partners**
- *Strategic Advisor,* **Resurface Labs**, an API security company funded by **Access Venture Partners, Pangea**, a security API service, **Scythe**, an adversary emulation and cybersecurity service
- *Advisory Board Member*, within the DoD, **National Security Agency**
- *Previous Advisory Board Member*, **UJET**, a cloud startup funded by **Kleiner Perkins**
- *Previous Clients*, **Pondurance**, a managed services provider; **Tenable**, a public vulnerability risk management company; and **RiskIQ**, a security analytics SaaS company (acquired by Microsoft)

SURGE
CMO CHALLENGE

Based on the Best Selling Book

"Holly has written the definitive strategic marketing manifesto. She has shared the scar tissue you get only by living and breathing the ups and downs of building a business and has described those lessons in a straightforward, digestible, and fun read. As one who has reviewed thousands of business plans and hundreds of board plans, Holly nailed it. You must keep your eye on the horizon lest you go off course, but you better pay maniacal attention to the details that are driving to that horizon. Holly's sage advice acts as a rudder and should be absorbed by every B2B CEO trying to balance their ship."
Ted Schlein
Former Managing Partner, Kleiner Perkins; Founder Partner, Ballistic Ventures

"Rollo's advice is a lifeline for those preparing for a major transaction or going through a pivot. If you're ready to turbocharge your software business and find hidden value, Power of Surge is an indispensable guide."
David Lang
Partner, KKR

"Refreshing and powerful. Rollo's insights about how to use strategic marketing as a value driver are helpful and impactful. She not only diagnoses root causes hindering results but also offers actionable remedies that CEOs can put to work immediately. The framework she lays out in this book can help companies set themselves up for long-term success."
Betty Hung
Managing Director, Vista Equity Partners

"Holly Rollo's new book is a must-read for any investor or CEO in the B2B software space. Her decades of marketing leadership success at important companies has given her the ideal perspective for crafting a tight, actionable framework for creating competitive advantage. All of this is combined with a highly accessible narrative style. What is not to like?"
Seksom Suriyapa
Partner, Upfront Ventures

THANK YOU!