Crystal

Pre-meeting Report

Account: G2.com

Prepared for: [YOUR SALES REP]

Executive intelligence

Godard Abel

Godard Abel — Co-Founder & CEO

(Independent) (Persuasive) (Determined)

Location: Boulder, Colorado

Education: Massachusetts Institute of Technology, Stanford University

Professional background:

- Co-Founder & CEO @ G2 (2012 - Present)
- Executive Chairman @ Logik.io (2021 - Present)
- SVP & GM, Steelbrick @ Salesforce (2016 - 2017)
- CEO @ Steelbrick (2014 - 2016)
- Co-Founder & CEO @ BigMachines (2000 - 2011)

Executive priorities

- Enhance AI utilization in Sales and Marketing. (source)
- Expand G2's data-driven offerings and partnerships. (source)
- Advance and develop G2's AI-Powered software buying assistant, Monty. (source)
- Strategic growth and efficient global expansion. (source)
- Reach the "next peak" as a company. (source)

Quotes

- *"At any particular time, leaders are operating from either fear or love... strive to lead from a place of love, not fear."* - (source)
- *"I grew up in a family of entrepreneurs... I always wanted to be like my dad and my grandpa."* - (source)
- *"AI is just a better interface than forms-based searching."* - (source)
- *"To scale a business, focus on riding major trends, like AI right now. Ride these waves to accelerate the inevitable."* - (source)

Notable Ideas

ON LEADERSHIP......

"I believe the most effective leaders are those who lead from the front. They regularly engage with their customers and employees to continuously share their vision, receive feedback, and keep stakeholders aligned." (source)

ON HIS ENTREPRENEURIAL BACKGROUND...

"My journey began within my entrepreneurial family, growing up discussing business and observing my grandfather's pump manufacturing startup, Abel Pumps, scale up from the ground." (source)

ON SALES...

"The ultimate value of a salesperson is in building that human relationship and also letting the customer feel your culture, feel you're going to take care of them." (source)

ON B2B MARKETING...

"B2B marketing is changing a ton... the buyer is really in charge. They do their own research... and more people inclined to try it now." (source)

ON SALES HIRING...

"I do think leaders are born... if you hire a big class of BDRs... you'll just see that one of them is a natural leader." (source)

Media

▶ YouTube

Godard Abel (CEO of G2): Defining Software Categories
Interview covering G2's business model, growth strategy, and more.
October 2021

▶ YouTube

Godard Abel: Unlocking Success for Software Buyers and Sellers...
Interview by John Barrows, covering the importance of trust, organic growth, and AI.
September 2023

◖◗ Medium

5 Things I Wish Someone Told Me Before I Became a C-Suite Executive
Godard shares insights from his 20+ years in entrepreneurship.
October 2021

How to communicate

When communicating with Godard, be straightforward, assertive, and focus on the bottom line.
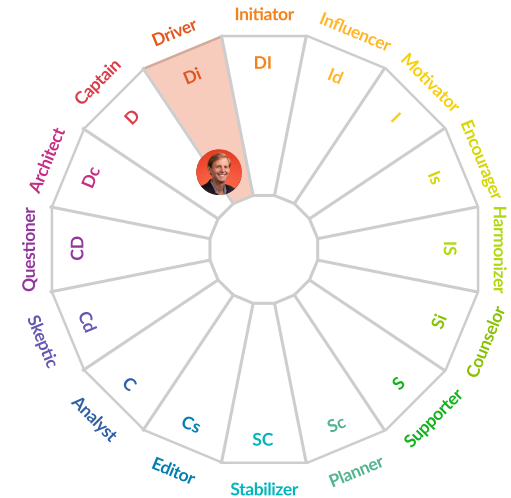
Do

✓ Be assertive and confident in your communication

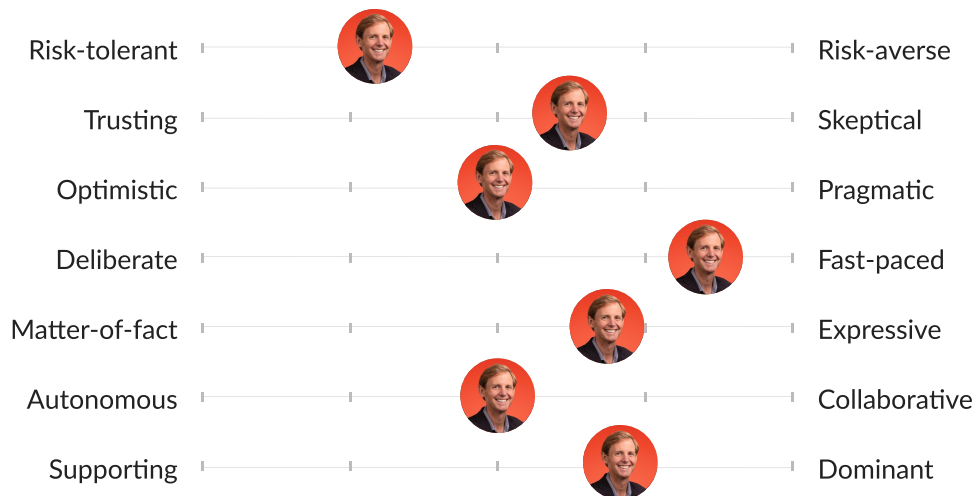✓ Focus on the end result and practical applications of the product

Don't

✗ Provide too many details that are not immediately relevant

✗ Be wishy-washy or passive in your approach

DISC Type: Di (Driver)

Personality traits

Risk-tolerant						Risk-averse
Trusting						Skeptical
Optimistic						Pragmatic
Deliberate						Fast-paced
Matter-of-fact						Expressive
Autonomous						Collaborative
Supporting						Dominant

Energizers & drainers

Energizers

- Ambitious goals
- Making quick decisions

Drainers

- Deep research and analysis
- Slow pace of work

Build rapport

- Highlight shared values like conscious leadership and nurturing talent.

- Show genuine interest in his entrepreneurial background and journey (BigMachines, Steelbrick, etc).

- Engage in high-level discussions about SaaS and AI, to pique his interest and show that you're well-informed in his field.

Gather information

- Ask open-ended questions that allow Godard to share the reasons and motivations behind his ideas.

- Ask about the criteria or metrics he uses to define success in his ventures.

- Ask for his advice on challenges or decisions you're facing personally.

Discuss budget

- Make sure the key budget stakeholders are involved early.

- Being upfront about your budget constraints or expectations.

- Stay open to innovative budgeting solutions or alternative financing models.

Drive action

- Present your proposals with clear, measurable outcomes.

- Demonstrate how a decision can help G2 accelerate growth in revenue, reviews, users, or another important metrics.

- Ask how Godard wants to proceed, rather than making assumptions.

Negotiate

- Work out a framework for the discussion before talking about price.

- Emphasize the long-term relationship and potential future collaborations, rather than focusing solely on the immediate transaction.

- Directly address competition and make comparisons.

Work together

- Foster a culture of open and regular communication, as Godard values transparency.

- Adapt to his leadership style, which is informed, visionary, and focused on nurturing talent.

- Be open to new ideas and continuous learning.

Mutual Connections

Neil Tejwani
VP of Sales & Customer Success
Crystal Knows
Hartford, Conneticut

Sarah Johnson
Director of Marketing
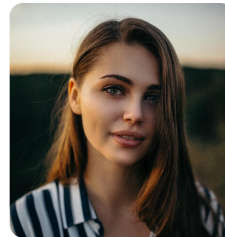TechNova Inc.
San Francisco, California

George Donovan
Chief Operating Officer
Crystal Knows
Boston, Massachusetts

Michael Patel
Senior Software Engineer
QuantumTech Solutions
Austin, Texas

Emily Mitchell
Vice President of Finance
Global Innovations Group
New York City, New York

Lisa Williams
Chief Sales Officer
StarBrite Electronics
Los Angeles, California

Robert Anderson
Human Resources Manager
GreenEnergy Corporation
Seattle, Washington

Daniel Martinez
Product Development Manager
MedTech Solutions
Chicago, Illinois

Account Intelligence

G2.com

G2 operates a software marketplace for business organizations to research, buy, and manage their software and services. G2 is the largest and most trusted software marketplace, helping 90 million people every year make smarter software decisions based on authentic peer reviews.

Industry: Technology / Software

Headquarters: Chicago, Illinois, USA

Revenue: $100-200M

Employees: 1,500+

Company Milestones

- **April 2023:** Monty (AI Assistant) released.

- **January 2023:** 2m+ software reviews.

- **June 2021:** Raised $157m in Series D funding round.

- **December 2018:** Made first acquisition, Siftery.

- **October 2018:** Raised $55m in Series C funding round.

Top Products

- **G2 Grid and Index Reports:** Identify the top software vendors in a variety of categories.
- **G2 Buyer Intent:** Find potential customers who are actively researching and considering purchasing software.
- **G2 Research Hub:** Acquire research and insights on a variety of technology-related topics.
- **G2 Profiles & Reviews:** Create and manage a business brand presence on G2.
- **G2 Market Intelligence:** Track and analyze technology market trends.

Key Executives

- **Godard Abel**, Chief Executive Officer
- **Eric Gilpin**, Chief Revenue Officer
- **Priti Patel**, Chief People Officer
- **Sarah Rossio**, Chief Product Officer
- **Chad Gold**, Chief Financial Officer
- **Eunice Buhler**, General Counsel

2012

2014

2016

2018

2020

2022

MAR 2012
Company launched

FEB 2013
$2m seed round of funding

MAY 2014
$2.3m Series A (1) round of funding

JULY 2015
$7m Series A (2) round of funding

SEP 2016
G2 surpasses 100K software reviews

DEC 2016
$4.3m funding round

MAY 2017
$30m Series-B round of funding

MAY 2018
Godard Abel named CEO

OCT 2018
$55m Series-C round of funding

DEC 2018
G2 makes its first acquisition, Siftery

MAR 2019
G2 acquires Advocately

JULY 2020
G2 lays off 5% of staff during Covid

NOV 2020
$30K Deal marked as Closed - Lost

JUNE 2021
$157m Series-D round of funding

JULY 2021
$10K Deal marked as Closed - Won

JAN 2023
G2 surpasses 2m software reviews

APR 2023
Monty AI assistant launched

SEP 2023
Eric Gilpin appointed CFO

NOV 2023
Chad Gold appointed CFO

Competitive Landscape

G2

Annual Revenue:
$100-200M

- Dominant leader in software reviews (5M+).
- Grew to 80 million users in 2023.
- Over 100% growth in 2 years.
- Comprehensive software discovery and management hub.

Capterra

Annual Revenue:
$50-100M

- Similar to G2 in size.
- Focused on mid-market and SMBs.
- Overlaps with G2 in some areas, but may be less comprehensive for enterprise needs.

TrustRadius

Annual Revenue:
$10-50M

- Smaller than G2 in size.
- Emphasizes in-depth research and detailed buyer journeys.
- Strong in specific verticals like HR and marketing software.

Gartner Peer Insights

Annual Revenue:
Unknown

- Focused on enterprise-grade software.
- Offers advanced features like market share analysis and risk assessment.
- Overlaps with G2's high-end offerings, but less accessible for smaller businesses.

GetApp

Annual Revenue:
$1-10M

- Smaller than G2, but rising.
- Focuses on a user-friendly interface and personalized recommendations.
- Less robust for in-depth research

Revenue Streams

Premium subscriptions
Businesses pay for access to advanced features like market data, buyer intent signals, and review management tools.

Marketing and advertising
G2 connects software vendors with potential buyers through targeted advertising and sponsored content.
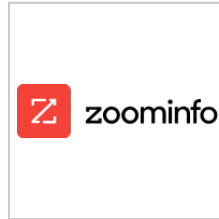
Data and research services
Enterprises purchase in-depth reports and insights on specific software categories and market trends.

Customers

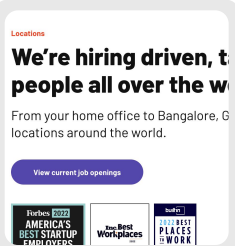- SAP
- Google
- salesforce
- IBM
- AUTODESK
- Microsoft
- HubSpot
- GONG
- Adobe
- zoom

Partners

- LinkedIn
- zoominfo
- HubSpot
- 6sense
- aws
- salesforce
- CHILI PIPER

Investors

- Accel
- IVP
- salesforce ventures
- HubSpot Ventures
- 50 SOUTH CAPITAL
- Pritzker Group VENTURE CAPITAL
- CHICAGO VENTURES

📰 Recent news

Type	Headline

Executive hire

🅱 BusinessWire

G2 Bolsters Finance Leadership, Appoints First CFO

Chad Gold joins G2 from Salesloft as Chief Financial Officer, bringing 20+ years of experience from pre- and post- IPO companies.

November 28th, 2023

Industry trends

🅱 BusinessWire

G2's State of Software Report Reveals AI is Powering the Rapid Growth of Software Globally

Based on millions of data points from real software buyer behavior and feedback on G2, the inaugural report explores key trends across the B2B software landscape.

October 17th, 2023

Executive hire

🅱 BusinessWire

Eric Gilpin Joins G2 as Chief Revenue Officer

Former Upwork Sales leader brings 20+ years of scaling tech businesses for high-growth to world's largest software marketplace.

September 20th, 2023

Expansion

🟢 IDA Ireland

G2 Accelerates European Growth with Expansion into Dublin

G2, the world's largest and most trusted software marketplace, today announced it has expanded its European presence into Dublin to grow its workforce while expanding reach to new customers and partners.

April 27th, 2023

Other executive intelligence

Chad Gold, Priti Patel

Chad Gold — Chief Financial Officer

(Decisive) (Fast-Paced) (Assertive)

Location: Atlanta, Georgia

Education: University of Florida, Emory University

Professional background:

- Chief Financial Officer @ G2.com (2023 - Present)
- Chief Financial Officer @ SalesLoft (2018 - 2023)
- Chief Financial Officer @ Rubicon (2017 - 2018)
- Chief Financial Officer @ SAP Ariba (2014 - 2017)
- Senior Director - Corporate FP&A @ Ariba (2013 - 2014)

Executive priorities

- Accelerate G2's growth while ensuring its financial health and sustainability. (source)
- Support G2's global expansion and leadership in the software market. (source)
- Guide G2 through potential future funding initiatives. (source)
- Succeed as G2's first-ever CFO. (source)

Quotes

- *"Finance should be the Hub at the center of every business decision... engaged in every facet of the company."* - (source)
- *"I worked in a myriad of different Finance roles... It taught me how to translate financials into operating metrics that the business can understand."* (source)
- *"One of my favorite parts of the job is spending time externally with investors."* (source)

Notable Ideas

ON HIS DECISION TO JOIN G2......

"At Salesloft, I was fortunate enough to see the company experience 10x growth. G2 has a clear opportunity to lead the market even further and I look forward to being part of G2's growth story." (source)

ON SETTING COMPANY GOALS...

"Setting targets is always a friction point, inevitably finance is going to push for a higher number than sales initially." (source)

ON PRODUCTIVITY...

"The first months as a CFO can feel overwhelming at times, as everyone wants you to fix everything at once. Pick a few key initiatives to tackle immediately and focus on incremental progress every day. Early wins will give you a strong foundation to build from beyond your first 90 days." (source)

ON HIS TENURE AT SALESLOFT...

"We were running like a public company before the [Vista] deal ever happened and so I think that put us in the best possible position to be successful." (source)

ON HIS PROFESSIONAL BACKGROUND...

"Finance should be the Hub at the center of every business decision... engaged in every facet of the company." (source)

Media

G2

Chad Gold Joins G2 as First-Ever CFO

G2 announces Chad's hiring and briefly summarizes his goals.

November 2023

YouTube

The Holy Grail of Growth with Chad Gold | CFO Weekly

Chad shares his wisdom on how CFOs can manage fast-growing companies.

October 2022

YouTube

CFO Thought Leader: Chad Gold

In this interview, Chad shares stories and insights for other CFOs.

July 2023

How to communicate

Focus on presenting clear, data-driven evidence of how the product will solve Chad's problems in an efficient way.
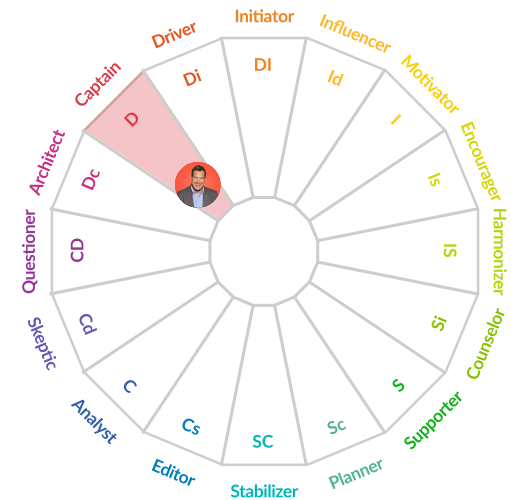
Do

✓ Provide him with specific data that supports the value of the product.

✓ Be straightforward and concise about the product's benefits.

Don't

✗ Use overly technical jargon or vocabulary.

✗ Spend too much time trying to connect on a personal or social level.

DISC Type: D (Captain)

Personality traits

Risk-tolerant — Risk-averse
Trusting — Skeptical
Optimistic — Pragmatic
Deliberate — Fast-paced
Matter-of-fact — Expressive
Autonomous — Collaborative
Supporting — Dominant

Energizers & drainers

Energizers

- Producing results
- Competition & winning

Drainers

- Missing deadlines
- Tangents unrelated to the main conversation

Build rapport

- Demonstrate interest and fluency in the basic concepts of corporate finance.

- Engage him with direct questions about the operational details of his business.

- Move the conversation quickly, showing a respect for his time.

Gather information

- Ask about high-level strategic goals first, and then about specific tactics.

- Understand his key metrics and KPIs: He frequently emphasizes the importance of connecting financials with operational metrics.

- Ask about his current processes, and how he is trying to improve them.

Discuss budget

- Frame budget discussions in the context of achieving strategic growth.

- Discuss budget items in terms of ROI and measurable business impact.

- Chad believes in not just saying 'no' but offering alternatives. Present budget items with flexibility and alternatives.

Drive action

- Align your proposal with a specific financial goal that Chad or another executive shared with you.

- Ensure your arguments are backed by solid data.

- Given his focus on scaling and growing businesses, emphasize the long-term benefits of the decisions.

Negotiate

- Be prepared with alternatives: He prefers a 'yes, and' or 'no, but' approach.

- Have alternatives ready for your negotiation points.

- Highlight how the negotiation outcome can be a win-win, fostering a long-term partnership.

Work together

- Chad values being involved in operations. Regular updates and check-ins would be appreciated.

- Engage in a collaborative approach, as he values cross-functional partnerships.

- He values investing in people. Show commitment to team development and engagement.

Priti Patel — Chief People Officer

Sociable   Charismatic   Adventurous

Location: Chicago, Illinois

Education: Wisconsin School of Business, Northwestern University

Professional background:

- Chief People Officer @ G2.com (2021 - Present)
- Principal @ TribusAllen, Inc (2020 - 2021)
- Chief Operating Officer @ Life Cross Training (2015 - 2020)
- Founder & CEO @ Mindpoint, Inc (2014 - 2015)
- Marketing Strategy @ Pepsico (2013)

Executive priorities

- Drive a culture of conscious Leadership, encouraging employees to be aware of their own physical, mental, emotional, and spiritual bodies. (source)
- Implement and execute a successful "work from anyway" policy. (source).
- Cultivating a sense of belonging and community at G2. (source)
- Encouraging employee development and growth. (source)

Quotes

- *"I think what is inherent is trust in our employees that they know what's expected of them, and we trust each other to do it when they deem is best for them." -* (source)
- *"Belonging is feeling like you're in the right role doing things you love... living in your zone of Genius, inspired by conscious leadership... then G2 helping you find a way to be in that zone most of the time." -* (source)

Notable Ideas

ON COMPANY CULTURE...

"One of the concepts we were inspired by from Netflix's culture is this idea of freedom and responsibility... when you have clear goals, you have a clear vision... you have the freedom within the framework to [work] when you need to how you'd like to." (source)

ON PRODUCTIVITY...

"One way that I stay productive is that I block my morning so I don't look at my phone or Slack, especially for the first two hours of my work day so that I can focus on what's most important for me." (source)

ON EMPLOYEE RESOURCE GROUPS...

"We had one employee Resource Group we now have eight and what I'm really excited about is our employees actually LED that effort... we also brought in a consultant in Dei to help us with... measuring how we're doing to keep ourselves accountable." (source)

ON HER CORE MOTIVATION...

"I want my children to see me work hard and strive for higher goals. I want my sons to see that a woman can be successful at the highest levels of corporate America. I want my boys to know that their mom, the daughter of immigrants from India, chased after her dreams and achieved some pretty impressive things in her life. That is my WHY and what fuels me, even during the hardest of days." (source)

Media

TheOrg

FORGET WFH. PROFESSIONALS WANT TO WORK WHENEVER

This article discusses the importance of asynchronous schedules.

February 2023

YouTube

Why Productivity is at the Heart of a World-Class Employee Experience

Priti discusses how the role of HR is changing in order to build productive and successful organizations.

April 2023

G2

Choosing Your Why: Women Leaders Balancing Careers & Motherhood

Priti writes about women leaders balancing careers and motherhood.

May 2023

How to communicate

Use an energetic and lively approach to communicate with Priti. Engage her with clear and vivid communication.
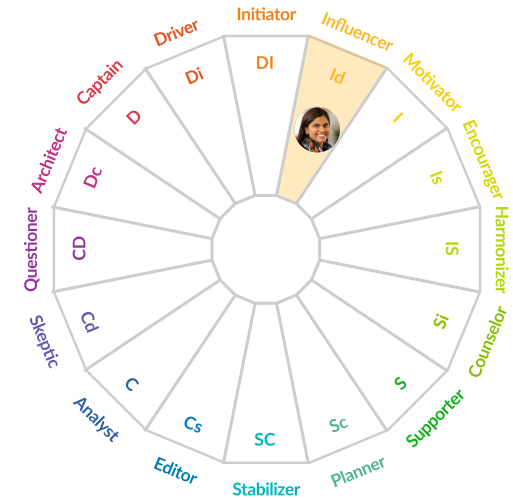
Do

✓ Use an inspirational, energetic approach

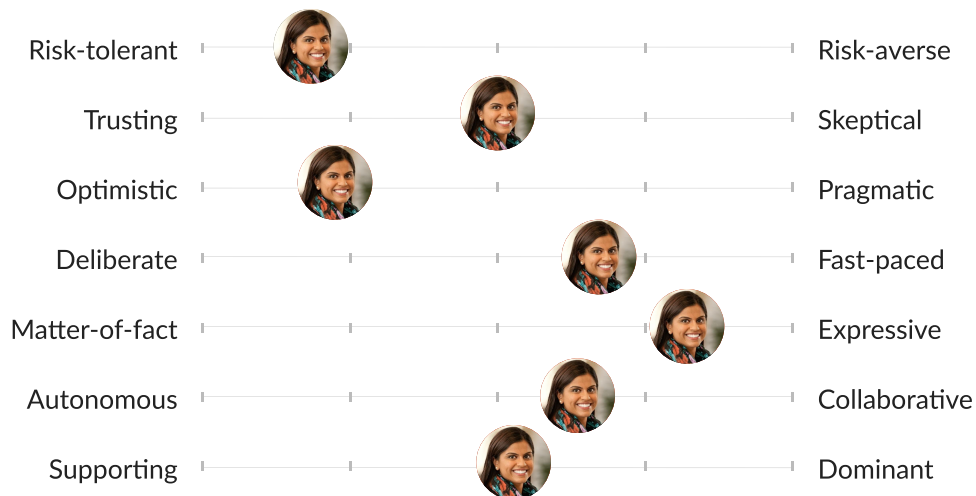✓ Actively seek opportunities to build personal rapport

Don't

✗ Ask probing questions before you have built rapport

✗ Focus solely on results without considering people-related factors

DISC Type: Id (Influencer)

Personality traits

Risk-tolerant	Risk-averse
Trusting	Skeptical
Optimistic	Pragmatic
Deliberate	Fast-paced
Matter-of-fact	Expressive
Autonomous	Collaborative
Supporting	Dominant

Energizers & drainers

Energizers

- Public speaking
- Experiencing new things

Drainers

- Rigid, inflexible schedules
- Repetitive, routine tasks

Build rapport

- Learn about conscious leadership and talk about the core concepts.
- Discuss high-level ideas about talent acquisition, employee experience, and creating a diverse workplace.
- Mention employee well-being and work-life balance.

Gather information

- Ask about the team first, then her personal goals.
- Given her background in executive coaching, ask for her perspectives on developing effective leadership.
- Ask about the underlying emotions and human elements behind company strategy.

Discuss budget

- Understand ROI of employee-related programs and how they contribute to the overall success of the company.
- Relate budget needs to G2's core values (like PEAK).
- Build a collaborative relationship with other budget-holders involved.

Drive action

- Show how the decision positively impacts employee experience, development, and company culture.
- Build personal rapport before pushing for a decision.
- Use social proof and expressive language.

Negotiate

- Ask for her input and feedback frequently throughout the process.
- Be direct, but also playful when you make a more aggressive ask.
- Emphasize the long-term relationship, and the likelihood of future negotiations.

Work together

- Encourage a culture of open and honest communication.
- Actively contribute to and support initiatives that align with her vision for building a positive and productive workplace.
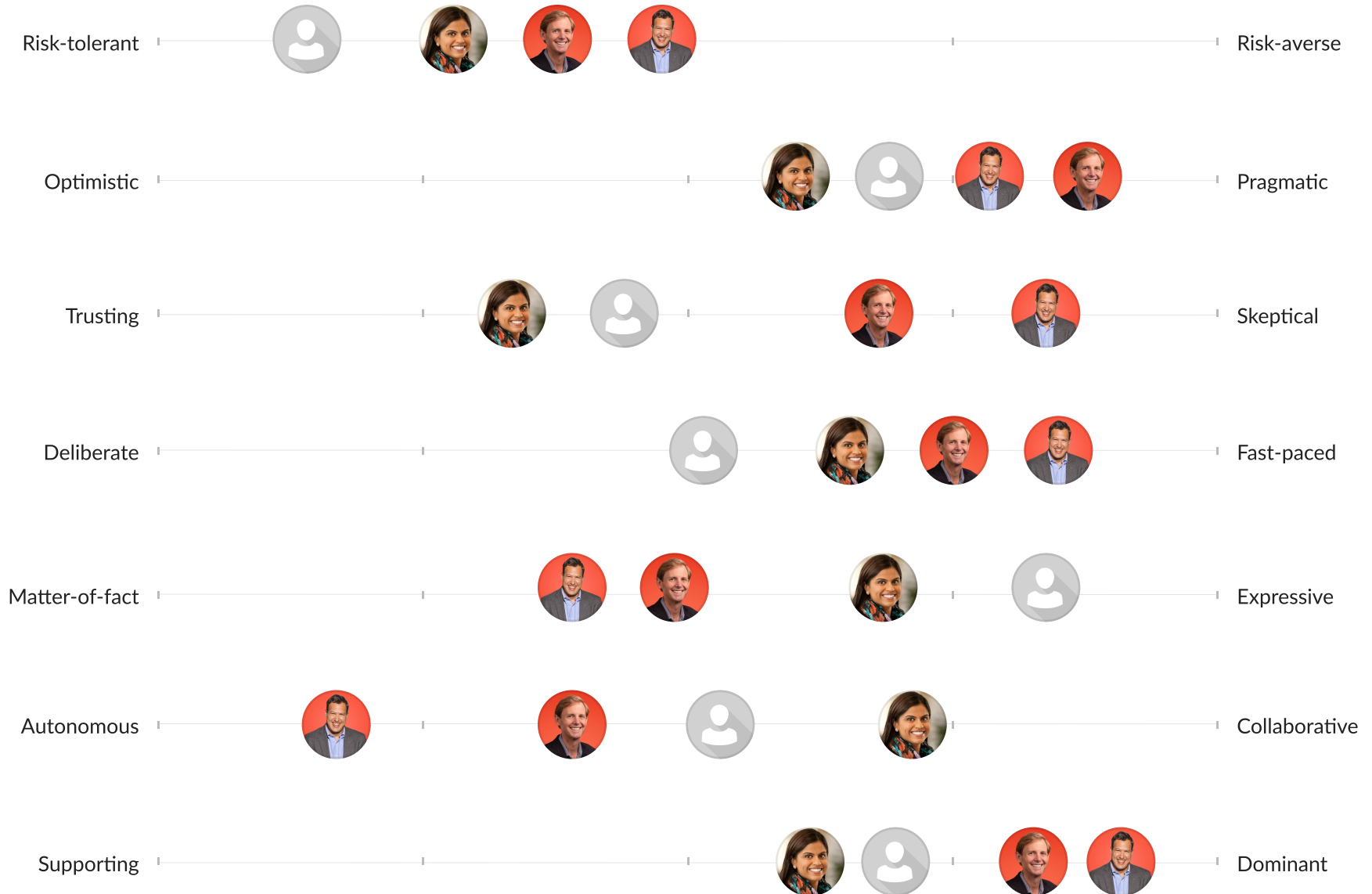- Engage in collaborative, group projects.

Group Dynamics

Godard Abel, Chad Gold, Priti Patel, & Your Sales Rep

Personality traits

| Risk-tolerant | | | | | | Risk-averse |

| Optimistic | | | | | | Pragmatic |

| Trusting | | | | | | Skeptical |

| Deliberate | | | | | | Fast-paced |

| Matter-of-fact | | | | | | Expressive |

| Autonomous | | | | | | Collaborative |

| Supporting | | | | | | Dominant |

Personality fit

Chad is likely to be very comfortable with this group's straightforward way of communicating and autonomous working style.

Priti will likely feel comfortable sharing ideas with the group, but may have a hard time adapting to others' straightforward communication styles.
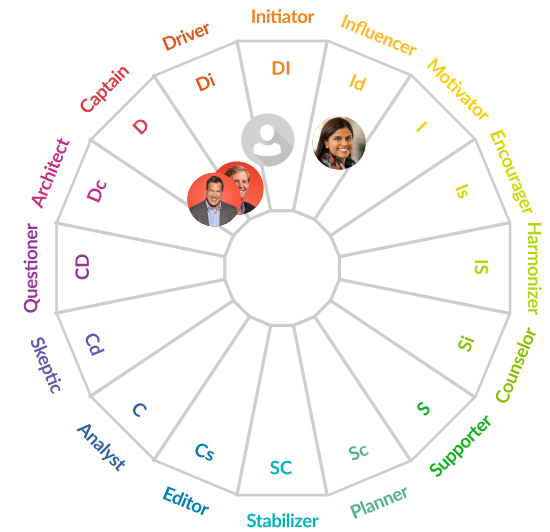
Godard is likely to be very comfortable with this group's straightforward way of communicating and autonomous working style.

Your sales rep will likely feel comfortable sharing ideas with the group, but may have a hard time adapting to others' straightforward communication styles.

DISC Map

D **Godard Abel** — Be direct

Di **Chad Gold** — Be brief

DI **Your Sales Rep** — Be casual

Id **Priti Patel** — Be compelling

Decision making style

Chad is likely to predict potential outcomes of each choice.

Priti is likely to consider the impact on the overall group before making an independent decision.

Godard is likely to ask tough questions to filter out the flawed options.

Your sales rep is likely to use an emotional, gut-driven approach.

Tips for the presentation

Focus on competitive advantages, speed, and efficiency.

Discuss how your product impacts each team, and the personal services you can provide.

Explain the 3-5 year impact on the company, and be transparent about total cost.

Crystal

Other Insights

Financial Highlights

1-year stock price - Sparkline chart

Key Insights

- EBITDA has increased $319M when comparing TTM to FY 2022. Their current EBITDA is $1.3B which is higher than pre-pandemic levels.

- Company A showcases robust net income growth, from $172 million to $359 million year-over-year for the 39-week period ending on September 30, 2023.

- Operating cash flow has seen a significant increase, highlighting efficient capital management and operational effectiveness.

- Strategic acquisition of Company X expands market reach and enhances distribution network.

- Commitment to innovation and customer service excellence is seen as core strengths in a competitive industry.

1 Build rapport

- Avoid being quiet or reserved
- Keep conversation brief
- Let him take the lead
- Don't be afraid to disagree

2 Build rapport

- Demonstrate a willingness to move quickly and drive change
- Share a big win from the recent past
- Ask direct questions that challenge existing assumptions
- Use a confident, but pragmatic tone

3 Build rapport

- Learn about his biggest macro-level goals
- Ask about major obstacles that may prevent a decision
- Encourage him to share feedback and interrupt you if necessary

4 Build rapport

- Challenge both parties to come up with a better solution
- Explain how taking action will help his team make progress more quickly
- Provide "off-ramps" and opportunities to change his mind later
- Provide simple, concise instructions with minimal dependence on other parties
- Highlight the competitive landscape, explain how the industry is moving and why change is necessary right now

REMINDERS

- Craft your hypothesis
- Ask for clarifying or validating feedback
- Be prepared to share what you learned

Organizational structure

Arvind Krishna

Chairman & Chief Executive Officer

John Granger

Senior Vice President, IBM Consulting

Christina Montgomery

Vice President & Chief Privacy &Trust Officer

Sebastian Krause

Senior Vice President & Chief Revenue Officer

James J. Kavanaugh

Senior Vice President & Chief Financial Officer

and 64 more...

Simon J. Beaumont

VP, Tax & Treasurer

Deana Korby

VP, Investor Relations

Robert Parker

CFO, APAC & Greater China

Tejaswini Rajwade

CFO, India & South Asia

and 6 more...