

Case Study: Moving upmarket into enterprise sales

Nearly Two and a Half Times the ARR of Any Customer in the Company's History

How an experienced operator moved a venture-backed B2B software company upmarket and closed the largest enterprise agreement in its history.

The Situation

A venture-backed B2B software company was selling almost entirely into small business accounts, with a few mid-market customers. The product was technically strong, but the value proposition, sales collateral, and commercial approach had all been built for a transactional small-business buyer.

The Thesis

For this category of solution, the complexity of the problem scales with the size of the organization. The larger and more distributed the environment, the more challenging the problem becomes, and the more compelling the solution. The company's real opportunity was in the large enterprise market.

The Approach

HEP led the pursuit of a national enterprise account and rebuilt the commercial approach around it.

- **Split the sales coverage.** Separated transactional accounts from strategic pursuits, so that sales time went to the larger opportunities rather than being spread across volume deals.
- **Repositioned the value proposition.** Reframed the solution around business value and operational outcomes rather than product capability, in language an enterprise buying committee would recognize.
- **Mapped 20 client-specific use cases.** Extracted the use cases specific to the prospect's environment and mapped the solution to each one, establishing value against problems the buyer had not fully articulated internally.
- **Built an enterprise-class proposal.** Created a new proposal from scratch, replacing collateral designed for a small-business buyer and meeting the expectations of enterprise procurement.
- **Led the contract negotiations.** Ran commercial and contractual negotiation through to signature.

The Result

A 3-year agreement at nearly two and a half times the ARR of the previous largest customer.

The same approach was applied to a subsequent pursuit roughly four times larger, which reached product demonstration through competitive down-selection before HEP's engagement ended.

Growth Pillars Applied

Value Proposition Narrative	Target Market Segments	Revenue Generating Assets	Sales & Marketing Budget
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Moving a company upmarket requires changing how the business is presented and who it is presented to. That takes someone who has run large enterprise pursuits and knows how to build the commercial assets those deals depend on.