

ALLEO.AI

CASE STUDY



How RCG supported Alleo.ai in navigating B2B2C partnerships within the tech industry

CLIENT BACKGROUND

Alleo.ai is a tech start-up founded by Dillon Doherty that was developed to provide an AI coach that mimics a human coach. Alleo.ai offers 24/7 AI-powered coaching, calendar integration, and task management through subscription-based memberships for individual users. Its service provides personalized, objective support to help users overcome challenges, stay accountable, adapt to changes, and make meaningful progress.

At the start of fall 2024, Alleo.ai was in the beta testing phase and concentrated on proving the app's effectiveness for individual users before targeting business partnerships. For potential partnerships, Alleo planned to serve as an in-between wellness coaching service for a business's employees in a B2B2C model.

Partnerships between Rambler Consulting Group and Alleo.ai began in spring 2024 and continued this past semester. Lucia Fiorito (Project Manager), Ella Janney, Aida Mehicevic, and Anna Cichelero were the Associates working on this case.

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SITUATION

Alleo.ai came to RCG for a 3-month long project to understand B2B2C models by gathering insights on successful implementations in the tech industry, evaluating Alleo.ai's current state to identify gaps in its business model, and outlining the next steps for Alleo to transition from a B2C to a B2B2C model. Alleo.ai and RCG had bi-weekly touchpoints, accompanied by deliverables, to share progress and discuss feedback. At the beginning of the project, RCG presented a 4-phase strategy to fulfill Alleo's goals:

1. Market research on B2B2C models
2. Feedback collection from stakeholder interviews
3. B2B customer discovery map
4. B2B2C roadmap and playbook

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ANALYSIS & RESULTS

The first three steps of the project were utilized for Alleo.ai's roadmap and playbook. RCG first identified key success factors in B2B2C models and assessed Alleo.ai's current state. Once RCG identified the gaps in Alleo.ai's structure and the successful implementation strategies, they conducted a series of stakeholder interviews with professionals to confirm the findings.

Next, RCG created the B2B customer discovery map by integrating interview insights and secondary research. The map was broken up into awareness, consideration, acquisition, buying decision, and retention and loyalty. Each component was later addressed in a combination of sections: touchpoints, customer process, emotion, customer goal, typical questions, buyer pain points, and metrics and KPIs. By forming a map that effectively addressed each part of customer discovery, Alleo.ai received a full understanding of the sales process from initial contact to customer conversion.

The B2B2C roadmap and playbook compiled the 3-month long project into an effective implementation plan for Alleo.ai. The playbook synthesized findings into flexible recommendations, equipping Alleo with step-by-step information for B2B2C implementation, regardless of changes in product offerings. Each step included related metrics that should be tracked during that step to aid decision-making and optimize processes.

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ANALYSIS & RESULTS

At the beginning of the project, RCG and Alleo.ai were primarily focused on the last steps of the playbook (i.e., sales motions and optimization). After assessing Alleo.ai's current state and better understanding the market best practices, the team concluded that a pivot to focusing on D2C, market evaluations, pricing structure examples, website additions, and lead identification was first necessary. Feedback from stakeholder interviews supported the decision to expand the project scope.

RCG interviewed a Techstars alum, Loyola professor, Learning and Development Consultant, VP of Product & Business Development, and VP of Sales & Marketing. From interview insights, RCG recommended that it is industry best practice to leverage Alleo.ai's current target market segment, define the Ideal Customer Profile (ICP), affirm pricing structures, and optimize social proof metrics before entering sales motions. Once these components are established, Alleo.ai can utilize outreach tools to cultivate partnerships with other businesses. The playbook highlights these crucial steps and how to foster them in the sales and post-sales process.

Although this shift added time constraints, the team delivered the proposed results and provided a comprehensive playbook that exceeded Alleo.ai's expectations.

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RECOMMENDATIONS

RCG delivered the final recommendations through the B2B2C Playbook. The playbook recommended an 8-step implementation plan for Alleo.ai to transition to a B2B2C model, including details of what had to be completed, how to complete it, and resources to leverage current and recommended tools (MailerLite, Google Analytics, etc.). Each step contained an overview, an explanation of the importance, decision methodology, actionable components, market examples or templates, and key metrics to track.

1. **D2C Development:** Focus on direct-to-consumer (D2C) strategy to lay a solid foundation for B2B2C sales. Aim to refine product offerings and build a loyal consumer base.
2. **Market Evaluation:** With a focus on the HR market, leverage active user segment(s) to select target businesses with similar employees. Factors such as competition and target business characteristics should be evaluated to determine the best target prospects.
3. **Pricing:** Choosing an effective pricing structure to maximize B2B revenue, convey product value, and be appropriate for the business prospect type is key to closing a B2B deal.

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RECOMMENDATIONS

4. **Website Additions:** Optimize the website to attract and convert B2B prospects by showcasing product value, highlighting the B2B value proposition, and facilitating inquiries and conversations.
5. **Lead Identification:** Accurate lead identification is crucial for targeting prospects who will benefit and engage with offerings. Aim to narrow down high-value prospects and create focused target lists to prioritize outreach efforts effectively.
6. **Sales Motions:** Leverage the customer discovery process through a series of emails, phone calls, and formal meetings. Utilize messaging recommendations, MailerLite's features, and templates to invoke engagement from prospects and close deals efficiently.
7. **Sales Optimization:** Optimize sales by implementing changes based on customer segment analysis. For example, specific demographics are more likely to open emails at certain times of the day or respond to different subject lines.
8. **Next Steps:** Continue communicating with the client after closing the sale to build the relationship and understand future goals.

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CONCLUSION

RCG provided a comprehensive recommendation through the B2B2C Playbook, which Alleo.ai will use for B2B2C implementation. With the insights gained from the playbook, Alleo.ai is well-positioned to scale its product and refine its business strategy. RCG looks forward to the future success of Alleo.ai.