The Strategy Brief

A New Buyer. A New Pitch. But Where Is the Evidence?

Testing a New Strategic Position Without Losing the Existing Market

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Insights Report

Executive Summary

This month's Strategy Circle Hot Seat explored a challenge that many strategy leaders will recognise: when a product begins to serve a different strategic need, how do you test a new market position without undermining the business that already exists?

The case centred on an intranet provider exploring whether its technology could play a larger role in AI governance. Traditionally purchased by internal communications and HR teams, the product also connects organisational knowledge, systems and expertise. That raises a different question: could the same capabilities help organisations govern what information people and AI systems can access?

The opportunity is compelling, but the buyer is not yet validated. IT, data, risk and governance leaders may care about different outcomes, have different budgets and require different evidence.

Rather than immediately rebrand the product or redirect the global sales organisation, the proposed approach was to use live APAC opportunities as a disciplined market test. Compare buyers, messages, deal economics and customer responses, then use the evidence to inform head-office decisions.

The broader lesson was not simply about intranets. It was about separating a plausible strategic hypothesis from a proven commercial opportunity.

A Product Can Evolve Faster Than Its Market Category

Product capabilities do not always fit neatly into the category customers already use to describe them.

In this case, the established intranet market is largely associated with employee communications, content and HR-led use cases.

But an intranet that connects policies, documents, systems and subject matter expertise may also help organisations identify trusted information and manage access to it. In an AI-enabled workplace, those capabilities could become more strategically important.

The opportunity is not yet the market.

The group explored a potential shift from a communications-led value proposition to one centred on risk, governance, security and information reliability. Yet several participants had not previously thought of intranets as a governance layer. Others saw the product as an enabler rather than the governance tool itself.

That distinction matters. A new way of describing a product does not automatically create a new purchasing category. Customers must recognise the problem, assign ownership, allocate budget and believe the proposed solution is credible.

The practical question is therefore not “What should we call the product?” but “Which customer problem can we demonstrate that it solves?”

The Buyer Is Part of the Hypothesis

The existing market has relatively familiar buyers: internal communications and HR leaders, sometimes with IT involvement in budgets or security approval. A governance-oriented proposition potentially introduces IT, risk and data leaders into the conversation.

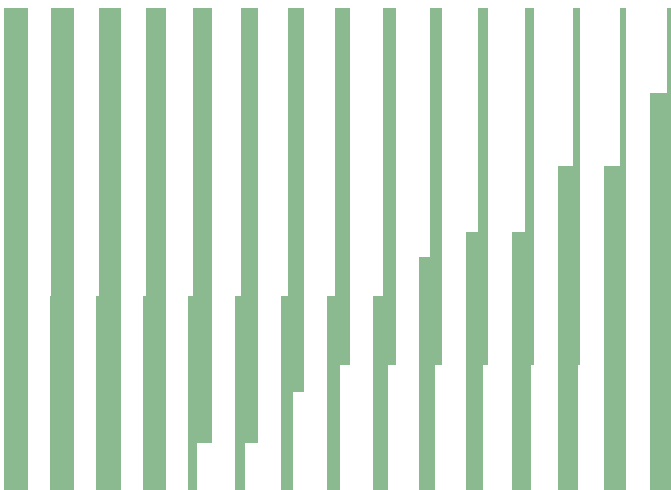
But these functions do not necessarily buy for the same reasons. A communications leader may value productivity and employee access to information. A risk leader may focus on inaccurate policies, inappropriate access and the consequences of AI acting on unreliable knowledge.

A different message may require a different buying process.

Before scaling a new proposition, the regional team needs to learn who feels the problem most acutely, who can sponsor a purchase, who controls the budget and who can block adoption.

The discussion also highlighted the possibility that IT might remain a security approver rather than become the economic buyer. That is not a failure of the hypothesis; it is an important finding.

Testing multiple stakeholder groups against real opportunities can reveal whether the product has a new buyer, a broader buying committee or simply a stronger message for existing customers.



Use Live Deals to Turn a Story Into Evidence

The most practical proposal from the Hot Seat was to test the new positioning through active APAC opportunities. The region can experiment within its sphere of influence while the global business continues serving its established market.

What should the test measure?

Buyer engagement: Which functions respond to governance messaging, request follow-up and participate in evaluation?

Commercial outcomes: Do opportunities differ in deal size, conversion, sales-cycle length or buying complexity?

Customer language: Which risks and benefits do prospects describe in their own words? Do they understand the proposed category?

Proof points: Can interviews, customer stories, segment feedback and relevant risk examples support the case for a broader shift?

The aim is not to collect only positive anecdotes. It is to compare the governance-led proposition with the established communications-led approach and understand where each is strongest.

A persuasive head-office recommendation should show what was tested, what changed, what worked, what did not and which assumptions remain unresolved.

Protect the Existing Business While Exploring the Next One

One of the tensions raised in the discussion was whether the organisation should move away from the word “intranet” altogether. Some participants favoured language around governance, security, risk management and efficiency.

However, a wholesale repositioning carries its own risk. The existing customer base understands the communications and HR proposition. Global marketing and sales remain oriented towards those buyers, and changing the category could introduce confusion before demand is established.

The two propositions do not have to be mutually exclusive.

The group discussed retaining existing use cases while testing governance-led messaging, potentially treating the new proposition as an additional capability or upsell rather than an immediate replacement.

This allows the organisation to learn without forcing a premature choice. It also helps separate three different decisions: which customer problem to prioritise, which buyer to target and what language to use in the market.

A controlled experiment gives leaders the option to scale, refine or abandon the new approach without disrupting a proven revenue base.

Key Takeaways

Several recurring themes emerged consistently throughout the session:

1. Treat positioning as a testable hypothesis.

A compelling strategic narrative is a starting point. Real buyer behaviour is what determines whether it deserves broader investment.

2. Validate ownership of the problem, not just interest in the idea.

Enthusiasm from a new stakeholder group is not the same as budget authority, purchasing responsibility or willingness to change.

3. Measure the economics of the change.

Buyer engagement matters, but deal size, win rates, sales cycles and customer evidence make the commercial case more credible.

4. Keep the current value proposition working.

Exploring a new category does not require abandoning the customers and use cases that support the business today.

5. Use regional autonomy to create organisational learning.

A regional team may not control global positioning, but it can create the evidence that helps global leadership make a better decision.

What This May Signal

The discussion began with a specific go-to-market challenge, but it surfaced a broader strategy problem: organisations often see a promising future direction before they know how to prove it.

At that point, the temptation is to make the story bigger. Rebrand the product. Redefine the category. Ask the wider organisation to move. This month's Hot Seat suggested a more measured alternative. Identify the uncertainty that matters most, design a test that produces useful evidence and protect the parts of the business that do not need to change yet.

The opportunity around AI governance remains a hypothesis, not a validated market conclusion. The proposed APAC test is intended to establish whether new buyers, stronger economics and a credible case for global adoption actually exist.

Perhaps that is one of the most useful contributions a strategy function can make: not just articulating the next opportunity, but designing a way for the organisation to learn whether it is real.

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Thank you!

Thank you for taking the time to read this Strategy Circle insights report.

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- quarterly in-person dinners
- content and research

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