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Commercial Systems | Full-Stack Marketer | GTM | Adoption

How I work and What I Believe

I build commercial systems that make complex value **understandable**, successful execution **repeatable**, and growth more **predictable**.

UNDERSTANDABLE

Customers adopt confidence before they adopt products.

[Get the Story.](#)

REPEATABLE

Capability is what makes product adoption stick.

[Get the Story.](#)

PREDICTABLE

Growth becomes more durable when judgment becomes a system.

[Get the Story.](#)

Words I Live By, Stories I've Lived



When growth outpaces the current system, build a new system.



Technical superiority isn't a positioning strategy.



Customer stories should do more than tell good stories.



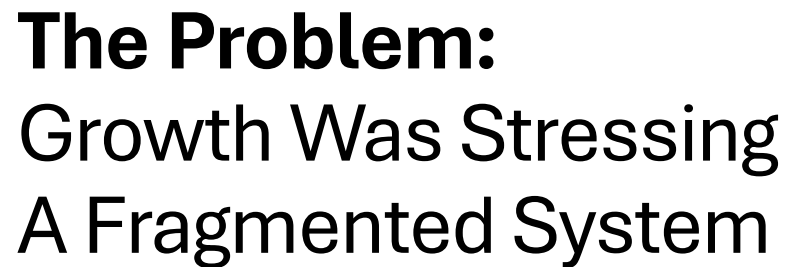
Sometimes the growth problem is a meaning problem.



AI gets interesting when it scales judgment, not output.



Implementation transfers technology, but education transfers capability.



Growth had outpaced the commercial infrastructure needed to support it. There were gaps in positioning, branding, sales enablement, customer evidence, planning, project management and measurement.

They needed to be treated as one cohesive system to achieve the next level of scale.





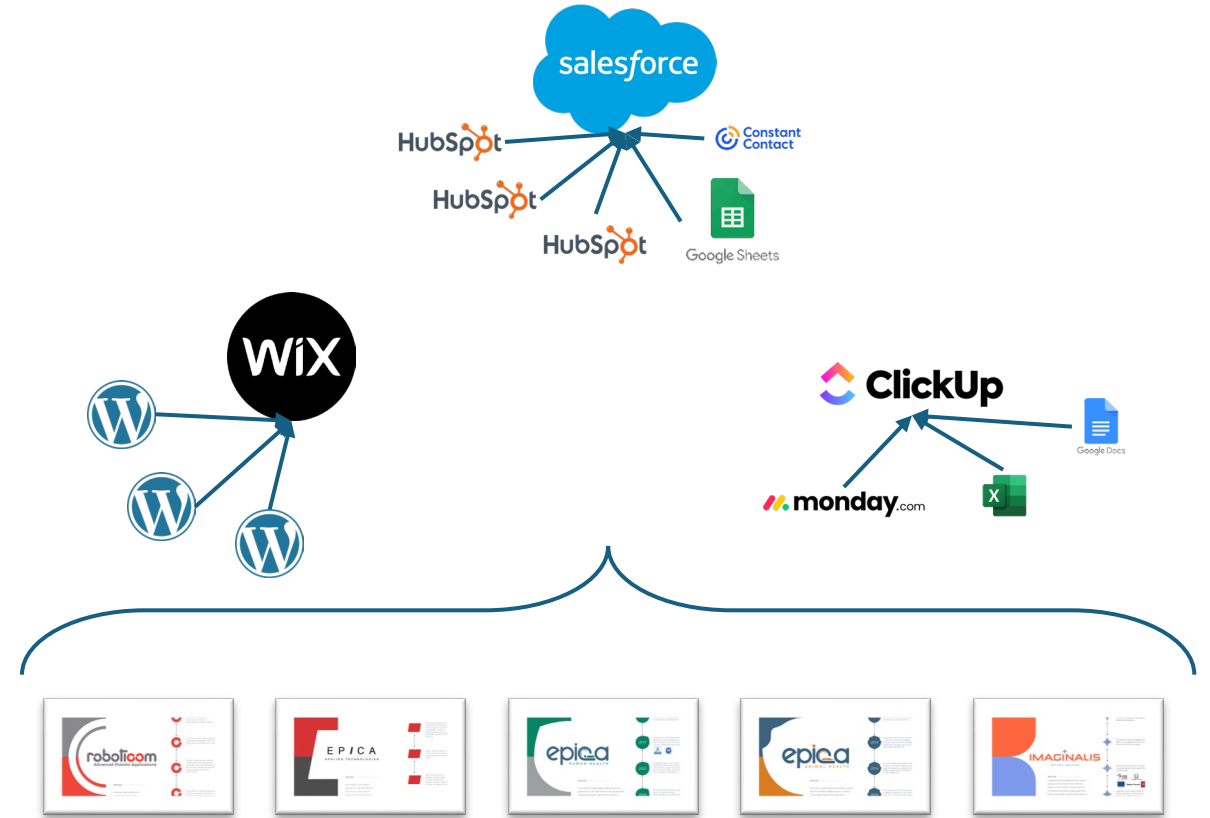
The Solution:

Next-Level Growth Requires Next-Level Systems

Job Title	Director of Marketing	Tools	Wix, Adobe, Teams, Google, Excel, ClickUp
Sector	VetTech , MedTech, Industrial Robotics	Skills	GTM Strategy, Commercial Systems, Cross-Functional Leadership
Entity	Epica International (VC-PE)	Role	Commercial Systems Architect

I built the shared commercial infrastructure:

- Consolidated technical systems like website builders, CRM, and project management systems.
- Redeveloped messaging, visual branding, and sales enablement systems including how assets were accessed and tracked.
- I collaborated with engineering, sales, leadership, customers to ensure alignment and deliver rollout.



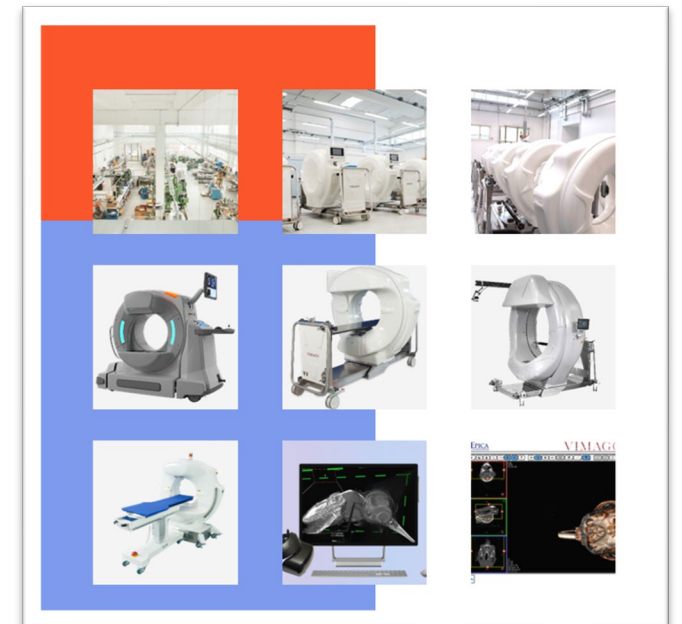


The Outcome:

Systems that Scaled from \$17M→\$35M

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Entity	Epica International (VC-PE)	Role	Commercial Systems Architect

Created commercial infrastructure that could support increasing scale and complexity as the portfolio grew from \$17M→\$35M.





The Problem:

Technical Superiority Isn't a Positioning Strategy

Job Title	Director of Marketing	Tools	Wix, Adobe, Google, CRM, Monday, Analytics, Camtasia
Sector	Veterinary MedTech	Skills	Positioning, Voice of Customer, Brand Strategy
Entity	Imaginalis Epica International	Role	Positioning & Commercialization Lead

Imaginalis had entered the market with meaningful technical differentiation, but competitors were catching up. As feature parity increased, specifications alone were becoming less effective at explaining why a veterinarian should choose us.

The opportunity was to move the positioning from what the technology could do to who the veterinarian could become because of it.





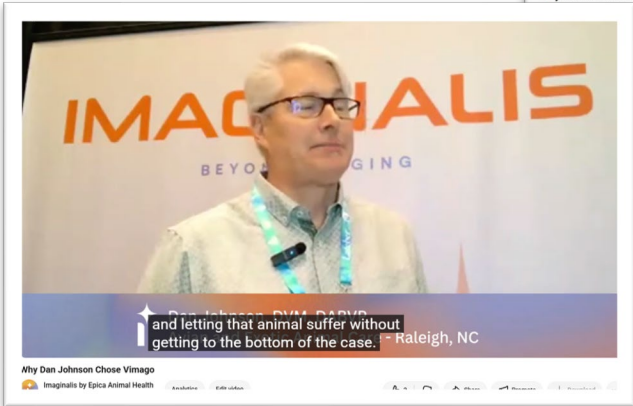
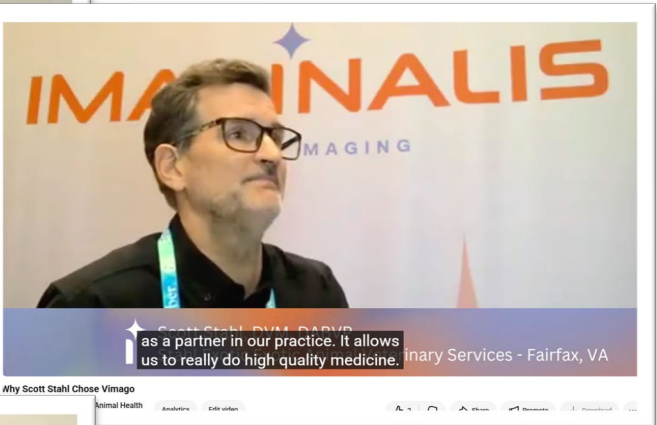
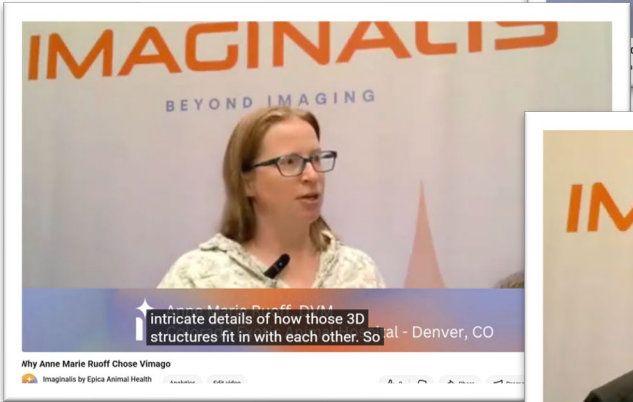
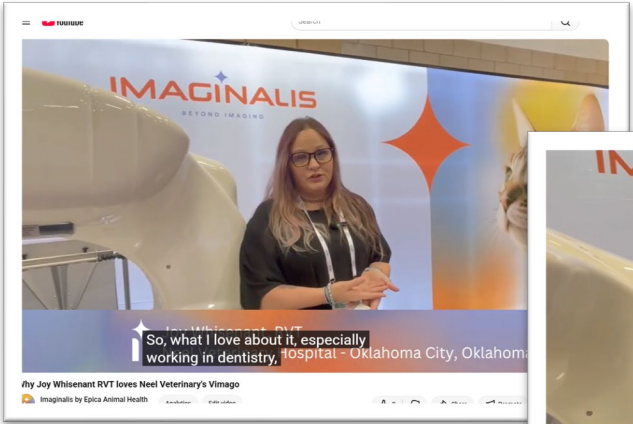
The Solution:

Repositioning Around Customer Identity Aspirations

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Entity	Imaginalis Epica International	Role	Positioning & Commercialization Lead

Customer conversations revealed that the deeper value wasn't simply better imaging. Veterinarians wanted greater diagnostic confidence, meaning: the ability to find answers, make decisions, and provide a level of care their 8-year-old self would be proud of.

I translated that insight into a new positioning system centered on “Be the Doctor With Answers,” then carried it through messaging, customer evidence, web, campaign, sales enablement, and brand execution.





The Outcome:

Achieving 90% of Annual Sales by EOQ3

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The repositioning gave Product, Marketing, Sales, and leadership one customer-centered value story instead of competing technical explanations.

It became the foundation for the global rebrand and commercial execution during a period in which the business reached 90% of its annual sales goal by the end of Q3.

Sales Goal for FY 2026: 60 Units

Sales by End of Q3 2026: 54 Units



The Problem:

No One Wanted to be the Face of the Company

Job Title	Director of Marketing	Tools	CRM, Adobe, Video, Analytics, WordPress, Teams
Sector	Industrial Robotics	Skills	Customer Insights, Evidence Strategy, Sales Enablement
Entity	Roboticom Epica International	Role	Customer Evidence & Advocacy Lead

Our customers repeatedly talked about the trust they had in our engineers and sales teams. We wanted to scale that trust in a deliberate way by increasing public thought leadership, but the people poised to be the personal face of the company didn't want to be spokespeople.

I saw an opportunity to make customer proof useful without asking our engineers to become promoters.



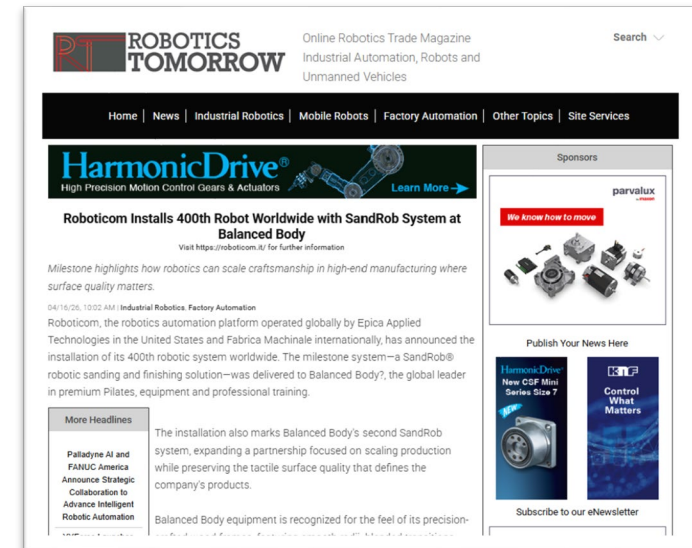
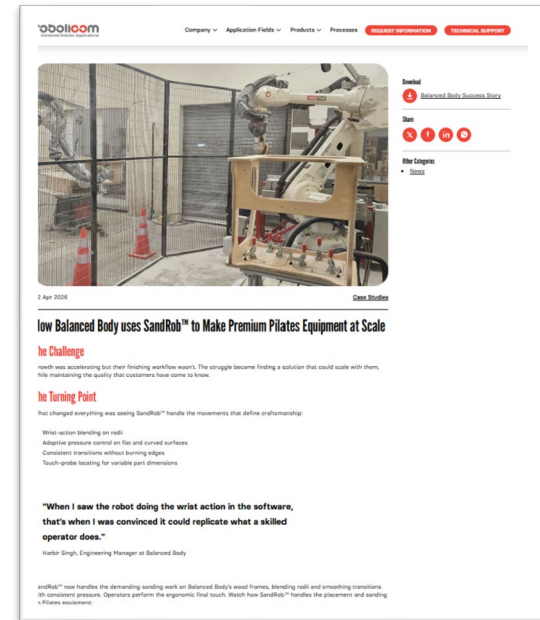
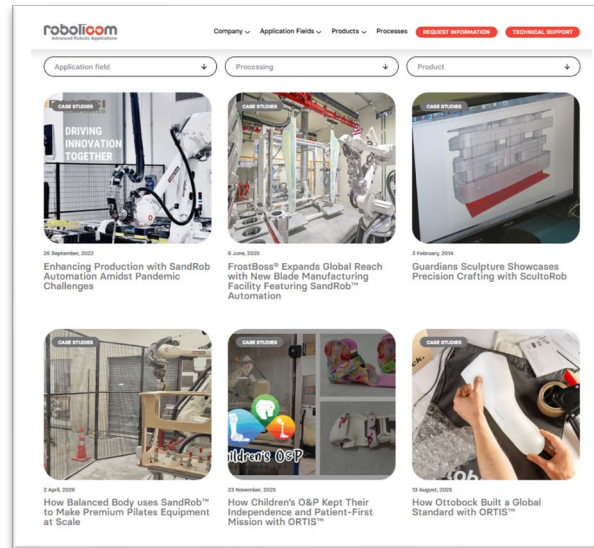


The Solution: Spotlight Customer Successes

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Entity	Roboticom Epica International	Role	Customer Evidence & Advocacy Lead

I built a customer evidence program around their work, their outcomes, and their experience using interviews to find the stories customers were genuinely comfortable telling.

Those conversations became a library of 12 flagship customer stories, then were repurposed across video, web, campaigns, PR, sales enablement, and distributor channels.





The Outcome: Customer Proof Outperforms Product Pages

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The resulting customer-story assets averaged 3.2x the engagement of product pages, giving Sales and Marketing a stronger way to demonstrate value through credible customer experience.

More importantly, customer evidence became reusable deal infrastructure, not one-and-done content.

3.2x More Engagement

Product Pages

1.0x

Customer Stories

3.2x



The Problem:

New Unit Sales Reached 60% of Target

Job Title	Director of Marketing	Tools	CRM, Excel, Hubspot, Constant Contact, Salesforce, Analytics
Sector	Veterinary MedTech	Skills	Lifecycle Growth, Value Proposition, Revenue Strategy
Entity	Imaginalis Epica International	Role	Lifecycle Growth Strategist

After a year in which new-unit Robot sales reached only about 60% of target, relying on new equipment sales for growth created too much exposure.

We looked instead at the installed base and found an underdeveloped recurring-revenue opportunity: only about 15% of eligible customers were attaching extended warranty coverage.

Sales Achievement, 2023





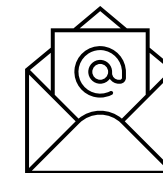
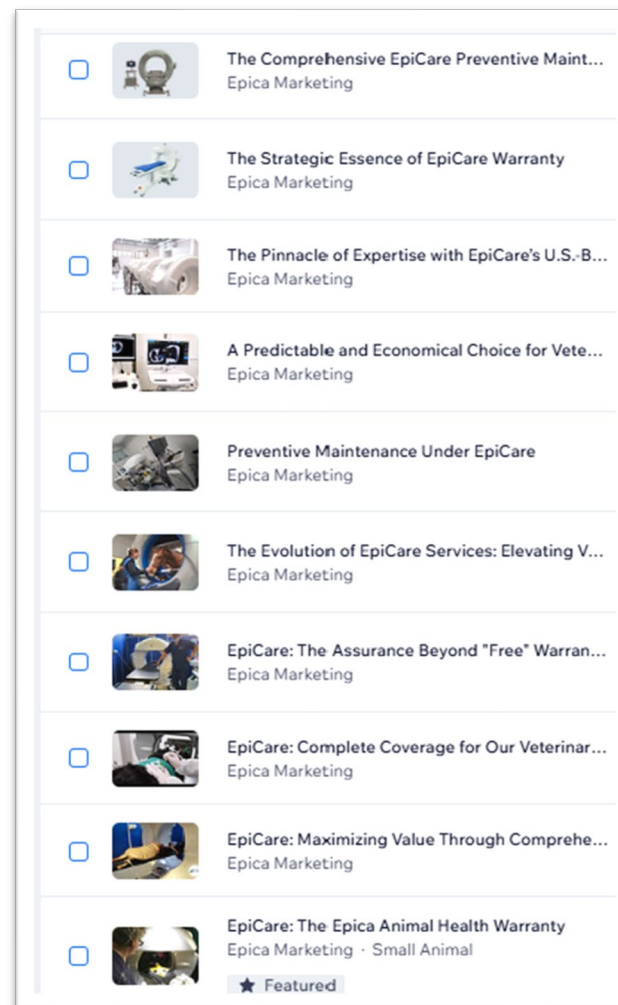
The Solution:

Reframing Warranty as Risk Reduction to Grow ARR

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Entity	Imaginalis Epica International	Role	Lifecycle Growth Strategist

Warranty was being presented as an optional add-on expense rather than protection for a significant capital investment.

I reframed the value proposition around risk reduction, predictable ownership costs, and continuity of operation, then carried that positioning into customer communications and sales enablement.





The Outcome: Increased Warranty Attachment 15%→66%

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Warranty attachment increased from approximately 15% to 66%, creating a stronger recurring-revenue stream from a growing customer base.

This represented an additional \$5.625M in revenue annually.

Warranty Attachment, 2023

15% of 200 Customers

Warranty Attachment, 2025

60% of 425 Customers



The Problem: Sales Targets Exceeded TAM

Job Title	Director of Marketing	Tools	GPT, CRM, Excel, Automation
Sector	Industrial Robotics	Skills	Market Expansion, ICP Strategy, AI-Enabled GTM
Entity	Roboticom Epica International	Role	Commercial Intelligence Architect

Our growth targets had begun to exceed what the existing market could realistically support. We needed to identify and enter an adjacent vertical, but conventional market research and prospecting would take too long and required more budget than we had available to invest.

I saw an opportunity to use AI to compress the work of finding, evaluating, and prioritizing a new market.





The Solution: Break into an Adjacent Vertical - Quickly

Job Title	Director of Marketing	Tools	GPT, CRM, Excel, Automation
Sector	Industrial Robotics	Skills	Market Expansion, ICP Strategy, AI-Enabled GTM
Entity	Roboticom Epica International	Role	Commercial Intelligence Architect

I built an AI-assisted commercial intelligence system that combined ICP criteria, market research, buyer signals, customer evidence, and messaging logic to identify and prioritize high-fit opportunities.

The system moved from market identification → account qualification → evidence matching → personalized outreach, allowing a small team to test the new vertical at speed.

SCRAPE

- Pull exhibitor data from relevant trade shows
- Sort by relevancy to our product

Human Review

EVALUATE

- Research relevant companies against ICP, current customer data
- Identify company's decision tension for next phase of growth

Human Review

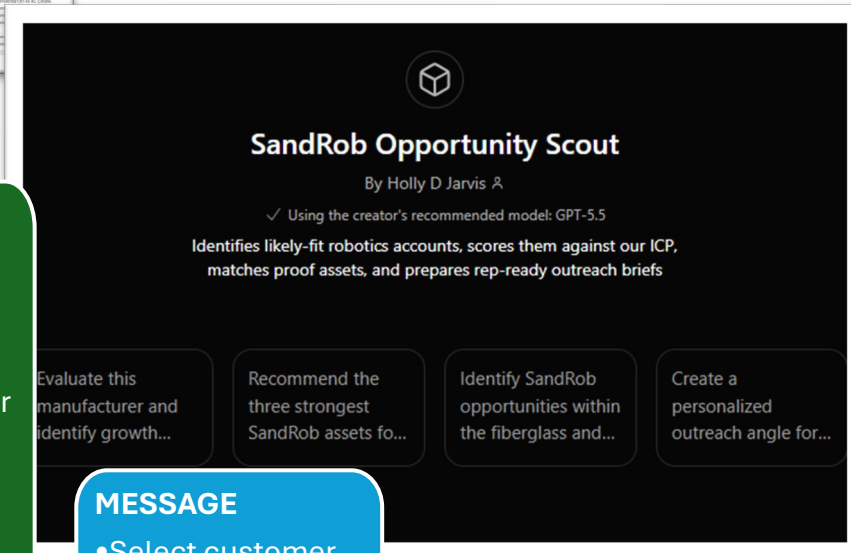
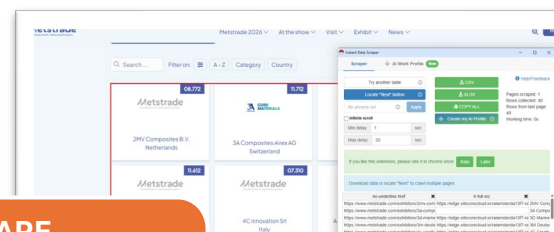
MESSAGE

- Select customer proof point from asset library to match growth tension
- Prepare role-specific outreach message

Human Outreach

NURTURE

- Salesforce tracks sends, opens, clicks, replies
- Salesforce automates workflow to further nurture with additional customer proof points aligned to their interest





The Outcome:

\$6.2M in new Pipeline in First Month

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Within the first month, the new system identified and supported outreach to opportunities representing \$6.2M in new pipeline in the adjacent market.

More importantly, we had turned market-entry judgment into a repeatable commercial process rather than a one-time research exercise, with \$0 incremental investment.

Adjacent Market



Composites

ICP Signals



Industry, process, materials, fit

AI Research



Account, Application Intelligence

Evidence Matching



Relevant Proof, Use Case, Value Proposition

Sales Enablement



Personalized Messaging, Outreach

\$6.2M new Pipeline Month 1



The Problem: Implementation Wasn't Scaling Impact

Job Title	Learning Strategy Consultant	Tools	Brightspace, Analytics, Zoom
Sector	Ed Tech / Higher Ed, K12	Skills	Adoption Strategy, Customer Education, Change Enablement
Entity	D2L Startup→IPO	Role	Customer Adoption Architect

Customers could successfully implement the technology, but often struggled to get happy users. Implementation CSAT was high, while renewal rates remained relatively sluggish.

Technical implementation transferred the platform, but not the capability required to create meaningful, sticky adoption.

I recognized that sustained utilization required us to strategically support customers with customized adoption resources.

CSAT ↑

Renewals —



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Sector	Ed Tech / Higher Ed, K12	Skills	Adoption Strategy, Customer Education, Change Enablement
Entity	D2L Startup→IPO	Role	Customer Adoption Architect

I partnered with customers to identify where adoption was breaking down, then built customized education strategies around their users, goals, and barriers to adoption.

Rather than teaching the platform, we focused on building the skills, confidence, and practices users needed to get value from it through targeted resources, workshops, coaching, thought leadership, and ongoing engagement.

[illegible]



The Outcome:

Utilization 2x for New Users, 3x for Returning Users

Job Title	Learning Strategy Consultant	Tools	Brightspace, Analytics, Zoom
Sector	Ed Tech / Higher Ed, K12	Skills	Adoption Strategy, Customer Education, Change Enablement
Entity	D2L Startup→IPO	Role	Customer Adoption Architect

Customers using the adoption approach saw 2x utilization among new users and 3x utilization among returning users, demonstrating that the constraint wasn't successful implementation, it was what happened afterward.

The work established customer education as a strategic lever for adoption, value realization, and ultimately retention.

Similar Client Success

Private educator of medical professional staff

Online and in-person educator for medical and dental staff.

17,000 FTE
Accelerated 7-week terms

Their Need

Busy clinical teaching staff, many different user groups needing **transition support**, 7-week terms, sense that they needed to **see value quickly**

Their Services

150+ Consulting hours in a custom project

Consulting Response

Advised on CBE Strategy, **planning for Change**, planning Training, Stakeholder Focus Groups after Pilot, Supporting Pilot and Rollout Evaluation

Their Results

- "Such a low number of help tickets"
- "We want to make this approach the way we do all change here."
- Successful **Champions program**

Similar Client Success

Very Large K-12 District

Included teacher professional development and curriculum hub

86,000 students
7,000 teachers

Their Need

Second institution-level change in 1.5 years, **varying innovation configuration** by school level, extensive use of another platform

Their Services

Change Management Consulting

Consulting Response

Training on **Change Theory**, Custom **Communication Plan**, Coaching, TV script for public access show, keynote address at district-wide **Brightspace conference**

Their Results

- "Remarkable lack of problems"
- "Your expertise has made a big difference for us"
- **Campus Champions and Early Access program success**

Similar Client Success

Urban R1 University

Many schools and colleges streamlining into a single system

45,000 students

Their Need

Complex system of schools and colleges needing **customized approaches**, politically charged environment with **new leadership**

Their Services

Change Management Consulting

Consulting Response

Critiqued emerging **Change Plans**, Collaborate on **customizable communication plans**, 1-1 Coaching for change leader, Quick-Hit LMS tips for instructors to **spur ideal adoption**

Their Results

- "Haven't seen the pushback we were expecting."
- Working extensively across silos
- "Creating a course is **super simple and straightforward**."

Holly Whitaker

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