GO TO MARKET LIKE YOU MEAN IT

THE TACTICAL FIELD GUIDE FOR SCALING SAAS REVENUE

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The Tactical Field Guide for Scaling SaaS Revenue

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APPENDICES

APPENDIX A

THE GTM CANON

This is the starting list of core GTM metrics, practices, and stage gates. Every company adapts, but use these as your minimum operating backbone to begin with, and over time, you will develop your own canon.

ICP Clarity

- **Definition:** Your ideal customer profile is written down, shared, and agreed upon across Sales, Marketing, and Product.
- **Details:** Must include firmographics (industry, size, geography), technographics (tools in use), roles/personas, and specific pain points you solve.
- **Target:** At least 80% of the pipeline aligns with ICP.
- **Cadence:** Review and update quarterly.

Message Testing

- **Definition:** Outbound and inbound messages are tested for response and conversion.
- **Details:** Track reply rate on sequences, open rate on email subject lines, and positive vs. negative replies.
- **Calculation:** Reply rate = positive replies ÷ total delivered messages.
- **Target:** ≥10% positive reply rate on outbound sequences.
- **Cadence:** Review weekly; update sequences monthly.

Pipeline Hygiene

- **Definition:** Active pipeline free of stale or unqualified deals.
- **Rules:**
  - No deal is idle for more than 14 days without activity.
  - All deals must have clear next steps logged.
  - Close dates updated weekly.
  - Prioritize winnable high-value deals.
- **Measurement:** Percentages of deals compliant with hygiene rules.
- **Target:** ≥90% compliance.
- **Cadence:** Weekly review.

Stage Gates

- **Definition:** Documented entry/exit criteria for each pipeline stage.
- **Examples**
  - **Qualification**: ICP fit + discovery call complete.
  - **Proposal:** Solution validated + budget confirmed.
  - **Commit:** Stakeholders aligned + contract in draft.
- **Measurement:** Percentage of deals meeting criteria before stage advancement.
- **Target:** 100% adherence (no "happy ears" advancing).
- **Cadence:** Validate at weekly pipeline reviews.

Handoff SLAs

- **Definition:** Clear agreements for passing opportunities across teams (SDR → AE → CS).
- **Details:**
  - SDRs must log all discovery notes in CRM within 24 hours.
  - AEs must accept/reject within 48 hours.
  - CSM must receive the kickoff doc before a customer call.
- **Measurement:** SLA compliance rate = # compliant handoffs ÷ total handoffs.
- **Target:** ≥95% compliance.
- **Cadence:** Monthly review.

Forecast Discipline

- **Definition:** Forecasts tied to data, reviewed consistently, and tracked against outcomes.
- **Details:** Weekly forecast call with pipeline owners; variance analysis of commit vs. actual.
- **Calculation:** Forecast accuracy = 1 – |(commit – actual)/actual|.
- **Target:** ≤20% variance.
- **Cadence:** Weekly forecast review, monthly accuracy report.

Price Realization

- **Definition:** Ability to capture intended value in deals.
- **Details:** Compare contracted ARR to list price or target pricing.
- **Calculation:** Price realization = actual ARR ÷ list ARR.
- **Target:** ≥90%.
- **Cadence:** Quarterly review with finance.

Retention

- **Definition:** Track both logo retention and NRR.
- **Formulas:**
- Logo retention = (logos retained ÷ logos at start of period).

- NRR = (Starting ARR + expansion – churn – contraction) ÷ (Starting ARR).
- **Targets:** Logo ≥90%; NRR ≥100%.
- **Cadence:** Monthly and quarterly reviews.

APPENDIX B

PROCESS AND TOOLS BY GTM MATURITY

Stage 1: Zero to Something

PROCESS FOCUS

Prove someone will pay. Document an ICP hypothesis. Capture first 3–5 wins. Founder-led messaging. Ad hoc process.

CORE TOOLS

CRM (basic: accounts, contacts, opportunities, activities)
Calendar + video + recording
Shared docs for ICP notes, MAPs, and exit criteria

Stage 2: Selling Before Scaling

PROCESS FOCUS

Motion repeats. ICP sharpened. Stage gates + MAPs in place. SLAs enforced. Handoffs hold.

CORE TOOLS
CRM with hygiene rules and required fields
Sales engagement platform (sequencing, call/email logging)
Light data enrichment (basic firmographics)
Contract / e-sign tool

Stage 3: Hiring Without Breaking

PROCESS FOCUS
Non-founder AEs win. Forecast accuracy in range. Team trained. Playbook in use. Enablement emerges.

CORE TOOLS
CRM with enforced stage gates and loss reasons
SEP + enrichment + routing automation
Enablement repository (call library, objection bank, proof of value library)
Forecasting/reporting add-on or business intel layer
Billing + contract integration

Stage 4: Scaling With Confidence

PROCESS FOCUS
Efficiency holds at volume. CAC payback tracked. Churn/NRR stable. Portfolio diversification. Governance live.

CORE TOOLS

CRM as source of truth (integrated with contract + billing)

SEP, enrichment, and enablement are fully operational

Data warehouse (if readiness test reaches the pass threshold)

ELT + reverse ETL for reporting

Deal desk automation + approval workflow

Governance tools (data lineage, access logs)

APPENDIX C

B2B SALES MODEL COMPARISON

Sales Model: Founder-Led

Best for: Early-stage, pre-GTM fit
Pros; High signal, flexible, fast learning
Cons; Not scalable, emotionally taxing
Notes; Essential for learning message, ICP, and sales motion

Sales Model: SDR + AE

Best for: Mid-stage, higher ACV, outbound-driven
Pros; Clear roles, scalable process
Cons; Requires a tight process and enablement
Notes; Works best after messaging and ICP are validated

Sales Model: PLG

Best for: Self-serve tools, low-friction onboarding
Pros; Efficient, viral loops are possible
Cons; Requires product depth and usage triggers
Notes; Still benefits from outbound and CSM support for conversion and upsell

Sales Model: Inbound/ Marketing

Best for: Markets where buyers search and educate online
Pros; Scalable, content-efficient
Cons; Long ramp time, less control early
Notes; Layer in after outbound traction, with a proven message

Channel/ Partner Sales

Best for: Niche or global expansion
Pros; Access to trusted networks, lower CAC
Cons; Less control, slower feedback loops
Notes; Only works with strong ICP clarity and partner alignment

Enterprise/ Field Sales

Best for: Complex, high-ticket solutions

Pros; Large deal sizes, deep relationships
Cons; Long cycles, high CAC, significant support needed
Notes; Requires a strong GTM fit; use only when sales maturity is high

APPENDIX D

VISUALIZING METRICS

Metrics driven by data and key performance indicators (KPIs) are integral for tracking progress, spotting trends, and making educated decisions. Yet, many CEOs regard metrics and KPI tracking as a pure admin chore, only for reporting purposes. This view ignores the crucial role metrics play in helping CEOs and managers run their companies efficiently. Most start-ups that are rigorous and metrics-focused grow faster and achieve more success.

Effectively showcasing your data through charts, graphs, and tables is just as crucial as data collection. You need a clear and comprehensible view of the figures driving your business to draw insights from your data and articulate your company to others.

The following charts and tables are practical tools to convey what's happening in your business. Your approach to crafting and labeling these visualization tools will depend on your business and the message you aim to communicate.

Figure 1: Four Easy Metrics that Deliver Quickly.

Key outbound performance metrics (reply rate, meeting rate, win rate, and sales cycle) provide quick payback when tracked consistently. Even modest improvements across these areas can compound into significant gains in revenue efficiency.

Takeaway: Tracking a small set of simple outbound metrics offers an accessible way to identify progress and accelerate performance.

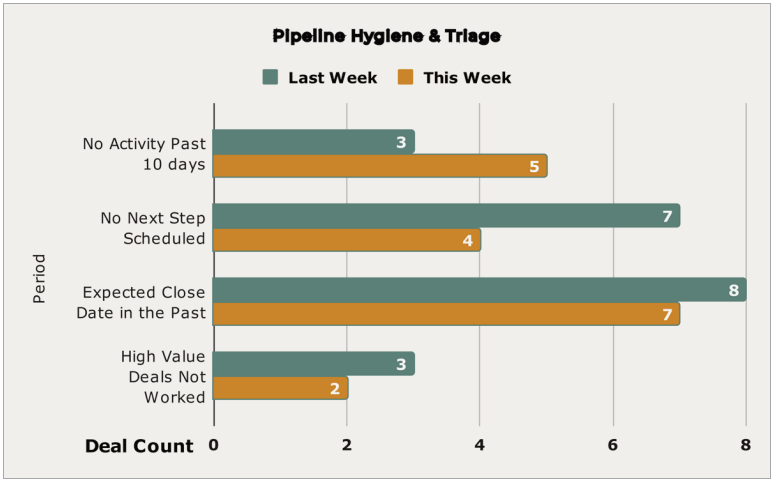

Figure 2: Pipeline Hygiene & Triage Summary.

Regular pipeline reviews are essential to maintaining deal quality and sales discipline. A weekly cadence ensures that every opportunity is actively worked, that stalled or unrealistic deals are cleared out, and that high-value prospects receive appropriate attention. This prevents "zombie" or "fantasy" deals from inflating the pipeline, keeps the team focused on winnable opportunities, and reinforces accountability by linking activity to measurable outcomes. A clean, honest pipeline is the foundation for accurate forecasting and consistent revenue performance.

Takeaway: A disciplined weekly pipeline review turns the pipeline into a tool for focus and truth, rather than wishful thinking.

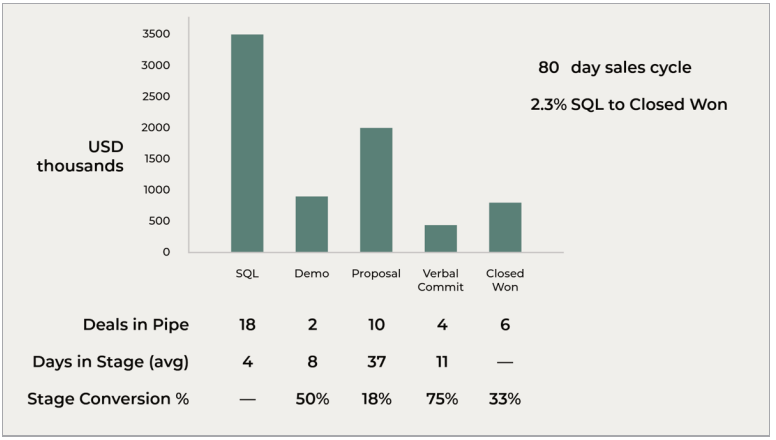

Figure 3: Sales Pipeline with TCV per Stage.

Visualizing your sales pipeline allows you to see where the value is, how long it takes to close deals, and how many deals are in your sales funnel at a glance.

Takeaway:_A clear, stage-by-stage pipeline view transforms intuition into evidence. By tracking deal volume, velocity, and conversion, leaders can pinpoint bottlenecks, forecast accurately, and focus coaching where it drives the biggest revenue gains.

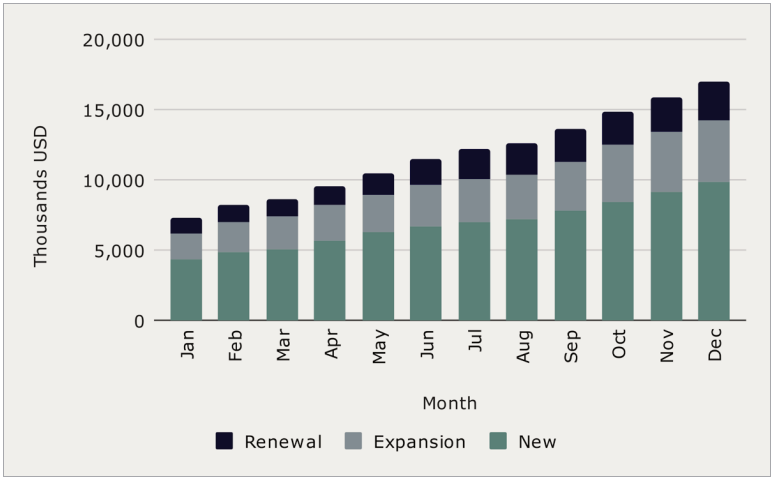

Figure 4: Book of Business.

This figure shows how your ARR (or MRR) Book of Business (BoB) trends. SaaS BoB is a company's recurring revenue from its current customer contracts. This includes recurring new, expansion, and renewal revenue. If a company has a large or growing BoB, it has a robust and (hopefully) stable source of future revenue. A SaaS company's future income and success depend on the health and growth of the BoB. Note that by categorizing the type of revenue, you can easily see how different revenue categories are trending versus the others. For example, you can break down the BoB chart to see revenue trends by product and customer segment.

Takeaway: Tracking your Book of Business shows whether your revenue engine is growing or leaking. A healthy mix of renewal, expansion, and new revenue signals product-market fit, customer satisfaction, and scalable growth. Weakness in any category reveals where retention, upsell, or acquisition needs attention.

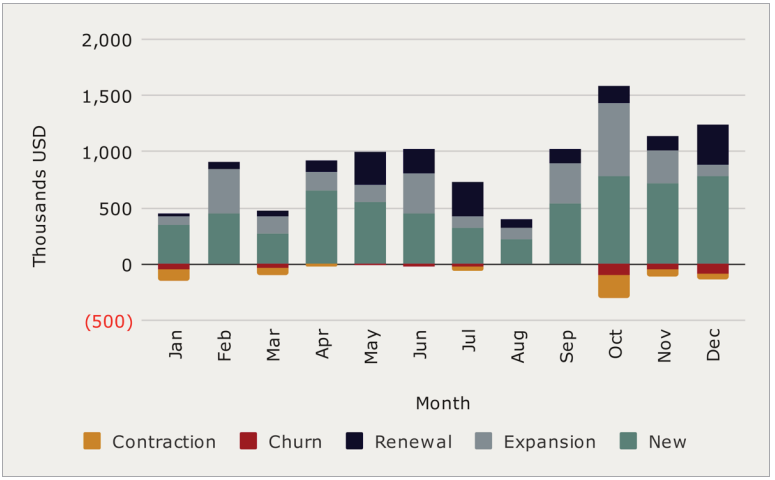

Figure 5: ARR Monthly Bookings.

Unlike the Book of Business, the Bookings chart is not cumulative. This chart shows each month's activity regarding positive and negative changes to your BoB, what category those changes are in (e.g., new business or expansion), and how those categories and the overall change in bookings are trending. This chart helps answer questions such as: Do you see mainly new sales, expansions, or renewals? What were your goals? Do the data match your goals? How do ratios trend over time? Which customers are buying more, and which are not? What is the sales team prioritizing? Are the sales performance or the product areas concerning?

Takeaway: Monthly bookings reveal the true motion behind your growth. By tracking new, expansion, renewal, and churn activity separately, you can see what is driving or dragging ARR. Healthy companies use this view to diagnose sales focus, customer retention, and product-market momentum in real time.

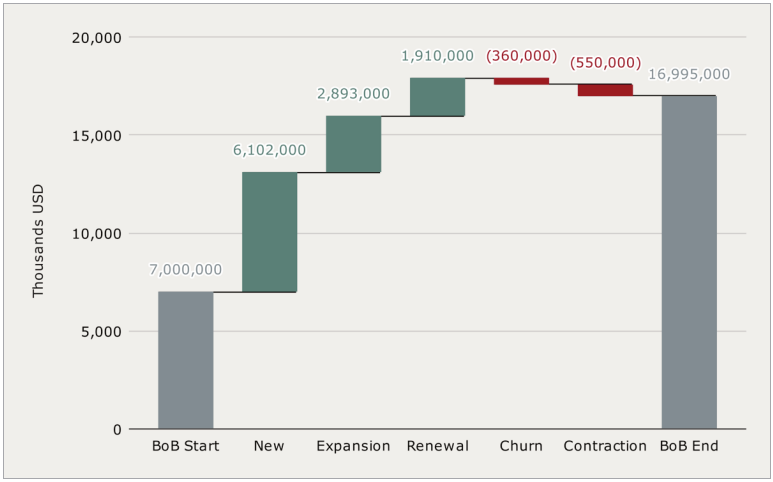

Figure 6: Bookings and BoB Waterfall.

This figure allows you to zoom in on a specific period. The waterfall presentation makes it easier to see what happened over a period of interest. This waterfall is also helpful in understanding the relationship between Bookings and the Book of Business.

Takeaway: A waterfall view turns revenue movement into a story of cause and effect. It shows how new sales, expansions, renewals, churn, and contractions shape total growth. Use it to pinpoint which forces drive or erode your Book of Business over time.

New Bookings (ACV)	$ 120,000	$ 70,000	$ 23,000
Renewals (ACV)	$ 175,000	$ 340,000	$ 280,000
Lost (ACV)	$ (12,000)	$ (12,000)	—
	Jan	**Feb**	**Mar**
Revenue			
Subscription License Revenue	$ 275,000	$ 270,000	$ 285,000
Usage-based Revenue	$ 150,000	$ 185,000	$ 210,000
Total Subscription Revenue	$ 425,000	$ 455,000	$ 495,000
Professional Services	$ 20,000	$ 25,000	$ 40,000
Other Revenue	$ 12,000	$ 1,000	$ 7,000
Total Revenue	$ 457,000	$ 511,000	$ 542,000
Cost of Goods			
Hosting Expenses	$ 22,000	$ 23,500	$ 26,000
Engineering (Salaries)	$ 14,750	$ 17,000	$ 16,500
Customer Success (Retention)	$ 25,000	$ 22,500	$ 26,500
Direct Costs (Third Party)	$ 2,750	$ 2,750	$ 2,750
Professional Services	$ 37,700	$ 38,500	$ 39,000
Total COGS	$ 101,500	$ 101,500	$ 110,850
Gross Profit	$ 355,500	$ 405,800	$ 431,150
Gross Profit Margin	78%	79%	80%
Operating Expenses			
Marketing	$ 89,000	$ 79,000	$ 90,000
Sales and Customer Success (Sales)	$ 122,000	$ 135,000	$ 140,000
Product Development	$ 125,000	$ 118,000	$ 155,000
General and Administrative	$ 73,000	$ 81,000	$ 83,000
Total Operating Expenses	$ 396,000	$ 413,000	$ 468,000
Operating Profit	$ (40,500)	$ (7,200)	$ (36,850)
Software Amortization	$ (75,000)	$ (74,000)	$ (73,000)
Sales Commissions Amortization	$ (30,000)	$ (35,000)	$ (40,000)
Interest Expense	$ (7,000)	$ (7,000)	$ (7,000)
Net Income	$ (152,500)	$ (123,200)	$ (161,850)

Figure 7: SaaS Income Statement.

This is a standard income statement with bookings and churn layered on top. This is useful for comparing bookings with GAAP (or IFRS) revenue in one chart. Historical financials are essential. Well-founded financials are not only for

reporting (though that is essential to running a business). Your financial statements tell the story of your business through numbers. The numbers and your narrative about the company's trajectory must support each other. Your financial performance tells investors and partners what they need to know as your business grows and sells. As the CEO, you also gain insights from financial reports, which show you where to focus on improvements and what's helping or hurting your business.

Takeaway: Your income statement is not just about compliance. It is insight. Use it to connect bookings, churn, and profitability to see how growth translates into real financial health. A disciplined read of your numbers turns data into decisions and strategy into measurable progress.

These dashboards are a minimum set for RevOps. Present the data in any form that is easiest for you and your team to consume, and see the trends and implications quickly. Standardize the units and scale of charts that present the same metrics. Never try to make the visual data look better than reality. Don't hurt your business to avoid hurting your ego. It doesn't do your business any good, and experienced board members and investors can see altered-reality charts instantly. Good or bad, the data is there to help you.

APPENDIX E

GLOSSARY OF TERMS

10 × 10 Message Test Loop

A tactical messaging test where you send 10 different message variants to 10 hand-picked targets each (100 total), tracking replies and reactions to identify the most resonant copy before scaling outreach. This is a real-world message and feedback loop, not a focus group.

ACV

Annual Contract Value. Average first-year contract value per deal.

Adoption

Ongoing use of the product's core actions, tracked as leading indicators of retention.

AE

Account Executive. Closing role that owns opportunities to contract.

Anti-ICP

Traits or triggers that predict poor conversion or retention; excluded by default.

ARPA

Average Revenue per Account. Recurring revenue divided by the number of active accounts.

ARPU

Average Revenue per User (or Unit). Total revenue per period divided by the total number of users (or units sold).

ARR

Annual Recurring Revenue. The total value of the annual-normalized recurring revenue book of business.
(see also ARR(e), MRR, RR)

ARR Capacity

Estimated new ARR added annually from the current funnel.
ARR Capacity = SQLm × CR × DS × (12 / SC).

ARR(e)

Effective ARR normalizes non-ARR contracts to 12 months, allowing them to be presented and analyzed together.

ASP

Average Selling Price. Average price per unit or seat, or average deal value divided by units. Normalize the contract length for consistency and comparability.

Attribution

Method to assign credit for outcomes to channels or touches; declares the model used.

Balance Sheet

One of the three standard financial statements, the balance sheet is a snapshot of a company's financial position at a specific time.
(see also Income Statement and Cash Flow Statement)

Book of Business (BoB)

ARR or MRR at a specific date after all changes.
(see Bookings, Churn, and Contraction)

Bookings

Value of contracts signed in a period, regardless of revenue recognition.

Burn Multiple

Net Burn Rate per new dollar of Bookings in a given period. The Burn Multiple measures a company's capital efficiency.

Burn Rate

A company's gross expenditures per period (typically monthly). Sometimes expressed in net terms (i.e., Burn Rate + Revenue).

Buyer Persona

The characteristics of the specific individuals within your ICP who participate in or lead the buying decision.

Buying Committee

Roles that must agree for a deal to close, such as champion, user, economic buyer, IT, and legal.

CAC

Customer Acquisition Cost. Fully loaded sales and marketing costs to acquire one new customer.

CAC Payback

Months to recover CAC from gross margin on new revenue.

Canon

See GTM Canon.

Capacity

Work your team can realistically perform in a period (calls, discovery meetings, demos). You must size campaigns to your capacity, not hope.

Cash Flow Statement

One of the three standard financial statements, the cash flow statement shows the inflow and outflow of cash and cash equivalents from a company's operating, investing, and financing activities over a specific period.
(see also Income Statement and Balance Sheet)

CDP

Customer Data Platform. A CDP pulls data from everywhere your customer interacts, cleans it up, and makes it available so teams can personalize outreach, measure behavior, or automate actions. It's often used alongside or instead of a data warehouse, especially when the company needs real-time, cross-channel customer insights without a heavy data engineering lift.

Champion

An insider who drives the deal, coordinates stakeholders, and wants your solution to win.

Change Log

Central record of definition, field, routing, or metric changes with date, owner, and reason.

Churn Rate

The percentage of customers or revenue lost over a given time period. Measured as either: Customer churn (logos lost) or Revenue churn (dollars lost).

Closed Won

Sales stage or status characterized by a signed or otherwise legally binding contract between a seller and a customer, outlining the provision of defined services in exchange for a defined fee.

COGS

Cost of Goods Sold (sometimes called COS or Cost of Sales, depending on your business model). This term has a specific definition in a company's accounting.

Cohort

A group that started in the same period (e.g., leads first seen in June). Used for apples-to-apples performance reads. Often used in marketing and also valuable for sales pipeline analysis, especially for identifying ICPs.

Cohort Retention

Percentage of a starting cohort's ARR that remains after N periods.

Contraction

Decrease in ARR from existing customers during a period.

Conversion Chain

Meeting Rate × Opp Rate × Win Rate.
Equivalent to weighted full-funnel conversion efficiency.

Conversion Rate

The percentage that advances from one stage to the next in a period.

Coverage

Pipeline value divided by the sales target for a period (e.g., 3× coverage for the quarter). Coverage without high-confidence stages is a vanity metric. The best practice is to use all qualified pipeline scheduled to close in that period, not the entire open pipeline (e.g., if the Q4 target is $1M and you have $3M in opportunities with close dates in Q4 → coverage = 3×).

CRM

Customer relationship management software (e.g., HubSpot, Salesforce).

CS/CSM

Customer Success or Customer Success Manager. Post-sales role that drives onboarding, adoption, renewal, and expansion. Some sources may refer to CX (customer experience).

Customer Journey

The customer journey is how the buyer advances toward a decision. See also Sales Process.

Data Dictionary

The controlled list of metric and field definitions used across tools and reports.

Data Warehouse

A central database that consolidates data from multiple systems for analysis and business intelligence.

Disqualify

Remove a lead or opportunity permanently for a defined reason code.

Dollar Churn

ARR lost in a period from existing customers.

Economic Buyer

The person who controls the budget and signs the agreement.

ETL / ELT / Reverse ETL

ETL (Extract, Transform, Load)
Data is **extracted** from source systems (like CRMs or apps), **transformed** into a clean, consistent format, and then **loaded** into a data warehouse.
→ *Used when data needs heavy cleaning or modeling before storage.*

ELT (Extract, Load, Transform)
Data is **extracted** and **loaded first** into the warehouse, then **transformed** there.
→ *Used in modern cloud warehouses (like Snowflake or BigQuery) where transformation is faster and cheaper at scale.*

Reverse ETL
Takes **modeled data from the warehouse** and **syncs it back** into operational systems (like HubSpot, Salesforce, or ad platforms).
→ *Used to activate insights — for example, sending product-usage scores or churn risk back to sales or marketing tools.*

Exit Criteria

Required, observable conditions to move a deal to the next stage; recorded as pass or fail.

Expansion Rate

Expansion ARR in period divided by starting ARR.

Forecast Accuracy

(Actual – Forecast) / Actual.

Forecast Bias

Directional error tendency over time (optimistic or conservative).

Forecast Categories

Standard pipeline buckets such as Commit, Best Case, Pipeline, each with entry criteria.

GAAP

Generally Accepted Accounting Principles. The accounting rules and standards used in the United States for preparing financial statements. GAAP emphasizes consistency, comparability, and detailed disclosure. It governs how revenue is recognized, how expenses are matched, and how assets/liabilities are valued. See also IFRS.

Give-Get

Concession rule pairing any discount or favor with a reciprocal customer commitment.

Gross Margin

(Revenue – Cost of Goods Sold) / Revenue.

GRR

Gross Revenue Retention measures how much recurring revenue you keep from existing customers after accounting for churn and downgrades, but ignores expansions.
Formula: (Starting ARR – Contractions – Churn) ÷ (Starting ARR). This calculation excludes expansions.
(See also NRR)

GTM

Go-To-Market. A coordinated system of processes, tactics, and insights that brings a product to market and generates revenue. GTM is not a department; it's a cross-functional revenue engine connected by RevOps.

GTM Canon

The baseline set of GTM metrics, practices, and stage gates such as ICP clarity, message testing, pipeline hygiene, handoff SLAs, and forecast discipline. The "canon" can vary slightly or broadly from company to company.

GTM Fit

Demonstrated evidence that messaging, offers, and channels consistently generate qualified conversations and close deals without the founder doing everything manually. It is the precondition for scaling.

GTM Maturity Stage

GTM maturity is your company's position on the GTM maturity ladder. This is about the business, not a deal pipeline stage. Below is how we think about a company's different growth stages.

- Zero to Something
- Selling Before Scaling
- Hiring Without Breaking
- Scaling With Confidence

Handoff

The moment ownership changes. For example, MQL → SDR, SDR → AE, AE → CSM. Record handoffs, which require a next step on the receiving side.

Hit Rate

Meetings that become qualified opportunities, divided by total meetings.

ICP

Ideal Customer Profile. Segment that buys fast at acceptable economics and renews; defined by traits and triggers.
ICP is typically the account (company), while the person you want to talk to is described by the Persona.

ICP Fit Score

Scored measure of how well a lead matches ICP traits and triggers.

Identity Key

Unique field used to match entities across systems (e.g., account_id, email).

Identity Resolution

Matching people or accounts across systems using keys to form a single record.

IFRS

International Financial Reporting Standards are the accounting framework used by most countries outside the United States. IFRS are principles-based, meaning they provide broad guidelines rather than highly prescriptive rules. Designed for global consistency so investors can compare companies across borders.
(See also GAAP)

Inbound Marketing

The process of attracting prospects through content, SEO, ads, referrals, or social proof. Requires validated messaging, clarity on ICP, and the ability to qualify interest quickly.

Income Statement

One of the three standard financial statements, the income statement, also known as the profit and loss statement (P&L), shows a company's revenues, expenses, and net income over a specific period (see also Balance Sheet and Cash Flow Statement).

Infosec

Information security review of products and processes during procurement.

iPaaS

Integration Platform as a Service. Tool for automating data syncs and workflows across apps.

Lead

Person or account that has shown interest but is not yet qualified against ICP and intent.

Lead Leak

The preventable loss of a qualified hand-off between funnel steps due to process, routing, or tooling gaps, not buyer rejection.

Lead Routing

Rules that assign new records to owners based on segment, territory, or round-robin.

Lead Scoring

A model that ranks lead priority using firmographic and behavioral signals.

Legal Review

Contract term review and redlines managed by legal or procurement.

Logo Churn

Count of customers lost in a period, regardless of dollar value.

LTV

Life Time Value (sometimes CLV; Customer Lifetime Value). Present value of gross margin over expected life; simple model: (ARPA × Gross Margin %) / Monthly Churn.
Sometimes also called CLTV.

MAP

A dated checklist shared with the customer that defines the steps from proof-of-value to signature to go-live. A mutual action plan (MAP) signals intent to buy and an agreed-upon roadmap regarding what is required to close the deal.

Marginal Cost

The additional COGS (or COS) incurred by adding each new user or unit. In other words, it is the cost of producing one additional unit (product or service) of output.

Meeting Rate

Meetings booked divided by targeted accounts or outbound touches.

Monthly Operating Review

Deeper checkpoint on conversion, pricing, hiring, and channel bets; closes the loop on experiments.

Motion

A specific go-to-market strategy such as Outbound, Inbound, or PLG.

MQL

Marketing Qualified Lead. Lead that meets marketing's engagement and fit thresholds and is ready for sales review.

MQL→SQL Rate

SQLs divided by MQLs for the period.

MRR

Monthly Recurring Revenue. Monthly contracted recurring revenue.

MSA

Master Service Agreement. A contract that defines general terms between parties.

Net New ARR

New ARR won in a period minus churn and contraction for that period.

No-Show Rate

Percentage of booked meetings that do not occur.

NRR

Net Revenue Retention measures how much recurring revenue you retain from existing customers after accounting for churn, downgrades, and expansions (upsells/cross-sells).
Formula: Starting ARR + Expansions – Contractions – Churn ÷ Starting ARR
This calculation includes expansions.
(See also GRR)

Opportunity

Qualified selling motion with value, stage, owner, and next step.

Opportunity Yield

Opportunities ÷ Meetings.

Outbound Sales

A GTM tactic where a company initiates contact with prospects (via email, phone, LinkedIn, etc.) to generate a pipeline. Often validates messaging and ICP faster than inbound.

Painted Door Test (aka, Fake Door)

A demand test where you present a real CTA to a not-yet-built feature or offer, capture clicks and hand-raises, and decide whether to build based on measured interest.

Pilot/POC

Proof of Concept. Timeboxed test to de-risk a purchase by proving value in the customer environment. POCs frequently stall or fail to convert to a full contract due to poorly defined goals and expected outcomes.

Pipeline

The total value of active deals that could potentially close. Often segmented by stage and weighted by probability.

Pipeline Coverage

Open pipeline for the target period divided by quota or ARR target. A typical health benchmark: 3–5x quota.

Pipeline Stage

A step in your sales process with clear, verifiable exit criteria. Keep pipeline stages to the minimum needed for pipeline hygiene and analysis. Label the stages with clarity. Ensure you define clear exit criteria for each stage. Some operators prefer to build pipeline stages around internal activities, while others prefer customer-centric activities. Choose the best method for your business needs.

Pipeline Stage Age

The number of days a deal has been in the current stage. Monitor stage aging to spot stuck deals and enforce management reviews. If a specific pipeline stage has a long average age, consider splitting it into two or more stages to find the bottleneck.

Pipeline Stage Exit Criteria

The non-negotiables to move forward (e.g., economic

buyer confirmed and next step scheduled). Confirm the exit criteria or do not advance the deal.

Pipeline Velocity

(Number of Opps × Win Rate × ACV) / Sales Cycle (months).

Play

A repeatable tactic that defines exactly who you're targeting (ICP), why now (trigger), what you're saying (message), and how you're delivering it (channel).

PLG

Product-Led Growth. A go-to-market approach where product usage drives acquisition, activation, and expansion. Often includes freemium models or free trials. Requires strong UX and onboarding without sales intervention.

PMF

Product-Market Fit. The state in which a product solves a meaningful problem for a specific market segment in a way that drives strong usage, retention, referrals, and revenue.

PMM

Product Marketing Manager (or Product Marketing).
Role: They own positioning, messaging, personas, competitive intel, and enablement.
In SaaS GTM: PMM bridges product → sales/marketing, ensuring ICP pain, value propositions, and assets are crisp.

Positioning

How you frame your product in the market relative to alternatives.

Price Realization

How much of your list price you actually capture at close and over the contract, after discounts, concessions, credits, and non-standard terms.

Procurement

The buyer's purchasing function that governs vendor risk, terms, and approvals.

Proof of Value (evidence)

Concrete, verifiable artifacts that reduce buyer risk

and support the value claim. Examples include a named case study, pilot outcome, ROI model, benchmark, security attestation, or customer quote tied to a metric. Proof of value should be specific, attributable, recent, and mapped to the buyer's key objections.

QBR

Quarterly Business Review. Strategic review of performance vs plan, resourcing, and roadmap; resets stage gates.

Quota Attainment

Actual bookings divided by quota for the period.

RACI

Matrix clarifying who is **R**esponsible, **A**ccountable, **C**onsulted, and **I**nformed for a decision or process.

Recycle

Move a lead or opportunity out of the active queue with a scheduled next review.

RevOps

Revenue Operations. Aligns GTM teams with systems, processes, and data. RevOps ensures that metrics are visible and actionable, and that systems support execution.

RevOps Backbone

Minimum set of definitions, fields, SLAs, capture, and scorecards that instrument the funnel end-to-end; stable core, modular edges.

RR

Recurring Revenue. A generic term that could mean MRR, ARR, or other recurring revenue metric.

Runway

A measure of how many months a company can operate with the current cash on hand.
Runway = Cash / Burn Rate

SAL

Sales Accepted Lead. MQL reviewed and accepted by sales within the SLA for follow-up.

Sales Cycle

Days from the first qualified meeting to Closed Won. It is helpful to track deals overall, by segment, and by ranges (revenue bands) of annual contract value (ACV). Separately track the time to the first qualified meeting, a marketing metric. RevOps also supports your marketing activities.

Sales Cycle

Median days from SQL to close-won. Many operators use the mean days.

Sales Process

The sales process is how your team advances the deal.
(See also Customer Journey)

Sales Velocity

How quickly the pipeline turns into revenue.
(Number of Deals) × (Average Deal Size) × (Win Rate) ÷ (Sales Cycle).

Sandbox

Non-production environment for testing changes before rollout.

Scorecard

Tactical reports showing progress against weekly or monthly targets.

SDR

Sales Development Representative. Prospecting role that books qualified meetings; sometimes called a Business Development Representative (BDR).

SEP

Sales Engagement Platform. A tool for sequencing touches, email, and call logging.

Sequence

Timed set of touches across channels to engage a prospect.

SLA

Service Level Agreement. A formal or informal agreement between two parties to take specific actions within a specific period.
The SLA is a time-bound rule for handoffs (e.g., from marketing qualified lead (MQL) → sales development representative (SDR) within 24 hours, SDR → account executive (AE) within four hours). Ensure that you trigger alerts for missed SLAs.

SLA Attainment

Percentage of items responded to within the SLA window.

SOW

Statement (or Scope) of Work. A contract that defines scope, deliverables, and timelines for services.

Sprint

A fixed two-week period to test measurable go-to-market (GTM) outcomes. These are experiments you run that challenge your assumptions. Plan one sprint at a time. Don't confuse GTM sprints with software sprints.

SQL

Sales Qualified Lead. Lead that meets the agreed discovery criteria and enters the opportunity pipeline.

SQLm

Sales-qualified leads per month.

SSOT

Single Source of Truth. The system or model that is authoritative for a specific entity (Account, Contact, Opportunity, Product).

Stage Age (pipeline)

Number of days a given opportunity has remained in its current stage.

Stage Aging (pipeline)

Median days opportunities spend in a given stage.

Stage Gate

Predefined test of a new message, channel, hire, or tool. Stage gates serve as readiness checkpoints that must succeed before adding resources, volume, or budget. This drives evidence over opinions. Seriously reconsider a decision to move forward when the data doesn't support it.

Stage, GTM Maturity

Organizational growth phase (e.g., Zero to Something, Selling Before Scaling, Hiring Without Breaking, Scaling With Confidence).

TCV

Total Contract Value. The total recurring and non-recurring revenue expected from a customer contract, including multi-year obligations.

TFR

Time to First Response. Time from inbound signal to first human response.

Trigger

Recent, observable event that increases buy probability (new funding, new exec, tool churn).

TTFV

Time to First Value. Time from contract to the customer achieving an agreed first outcome.

UTM Parameters

Standard URL tags that record campaign source, medium, and content.

Value Proposition

Short statement of the outcome you deliver for a specific buyer.

Voice of Customer

Structured program to capture insights from customers and prospects.

Weekly Revenue Review

Cross-functional meeting that inspects pipeline, leaks, SLAs, and actions using two scorecards.

Win Rate

Closed won divided by qualified opportunities, defined consistently across the organization.

APPENDIX F

WORKSHEETS

How to Use The Worksheets

This is your workbench. Each worksheet creates a decision or artifact your team will use daily. Execute one worksheet for each meeting. Decide, document, and move one metric per two-week sprint.

Complete the **Quick Start Pack** in order WS-01 to WS-05. Then, based on your team's gaps, select one or two Topic Pack worksheets every two weeks.

Review the results with your team's weekly or bi-weekly. Use pass or fail and keep or kill rules to decide on the next steps.

Note where you recorded this worksheet data so your team can find it. Many worksheets create an output that other worksheets may need.

The worksheets follow a standard format for consistency. Not all fields and rubrics always apply. Skip sections if they are irrelevant to your current stage, process, or test.

Each worksheet is one decision, one artifact, and one measurable outcome.

On the next pages, you'll find a quick-reference index of all worksheets—each with its purpose and use case. →

Worksheet Index

QUICK START

WS-01 GTM SNAPSHOT

Supports: Ch1, Ch2 | Timebox: 60 min | Participants: CEO, Sales, Marketing, CS, RevOps

Purpose: Align the team on what is true now across ICP, message, channels, process, proof, pricing, and capacity. Create a single-page snapshot that anchors the next two-week sprint and clarifies where to focus effort.

Use When: Kicking off a new GTM push or entering a new stage gate in your growth cycle.

WS-02 GTM MATURITY STAGE ASSESSMENT

Supports: Ch2, Ch17 | Timebox: 60 min | Participants: CEO/Founder, Executive Team, RevOps

Purpose: Score your current GTM Maturity Stage, define missing evidence, and select one weekly Bet per team to improve red or yellow areas. Produce a clear stage scorecard and change log.

Use When: After WS-01 and before large resource or budget decisions; repeat monthly.

WS-03 ICP GRID AND ANTI-ICP: TRAITS, TRIGGERS & EVIDENCE

Supports: Ch4 | Timebox: 60 min | Participants: Sales, Marketing, CS, RevOps

Purpose: Define the buyer profiles most likely to close quickly at full price and capture their behavioral triggers with proof from real deals. Identify anti-ICP red flags to avoid wasted outreach.

Use When: After WS-02 or anytime you see inconsistent win rates or discounts across segments.

WS-04 MESSAGE TEST GRID: VARIANTS AND DECISIONS

Supports: Ch5 | Timebox: 60 min | Participants: Product, SDR Lead, AE Lead, RevOps

Purpose: Test message variants using buyer language and numeric thresholds instead of opinions. Build a repeatable A-B-C grid that turns feedback into data.

Use When: After WS-03 and anytime reply rates drop or new segments emerge.

WS-05 FIRST SALES PROCESS & MAP

Supports: Ch8, Ch10 | Timebox: 90 min | Participants: Sales, RevOps, Top AEs, HR

Purpose: Document the whole path from first touch to close with clear exit evidence, SLAs, and a buyer-facing Mutual Action Plan (MAP). Create one teachable, auditable process.

Use When: Before hiring additional reps or formalizing forecasting; refresh every two weeks during early scale.

MESSAGING

WS-06 PROOF OF VALUE LIBRARY

Supports: Ch5, Ch10 | Timebox: 45 min | Participants: Product, Sales, CS

Purpose: Catalog every proof-of-value asset—case studies, demos, testimonials—and map each to its relevant pipeline stage and owner. Maintain a living inventory that drives confidence and conversions.

Use When: Before refresh cycles or enterprise pushes; revisit quarterly.

WS-07 OBJECTION LIBRARY

Supports: Ch5, Ch10 | Timebox: 60 min | Participants: Product, Sales

Purpose: Turn common objections into structured responses supported by proof and a clear next step.

Build a searchable objection library for training and outbound sequencing.

Use When: Before onboarding new reps or after patterns of stalled deals appear in win/loss reviews.

OUTBOUND

WS-08 TWO-WEEK OUTBOUND SPRINT PLAN

Supports: Ch6 | Timebox: 45 min | Participants: SDR Lead, AE Lead, RevOps

Purpose: Run a focused two-week outbound sprint with defined activity targets, message, and review cadence. Produce a short plan that measures what worked and what didn't.

Use When: At the start of every outbound sprint or when outbound consistency declines.

WS-09 LEAD LIST QUALITY CHECKLIST

Supports: Ch6, Ch4 | Timebox: 30 min | Participants: SDR Lead, RevOps

Purpose: Enforce standards for list accuracy and ICP fit before campaigns go live. Identify and correct weak data or missing triggers before wasting send volume.

Use When: Before every outbound launch or vendor import.

WS-10 OPENER VARIANTS TRACKER

Supports: Ch6, Ch5 | Timebox: 30 min | Participants: SDR Lead, Product, RevOps

Purpose: Track performance of opener lines or hooks across sprints to decide which to keep or kill. Maintain a simple log connecting message changes to results.

Use When: During each outbound sprint review or when reply rates fluctuate.

PROCESS & REVOPS

WS-14 REVOPS FIELD DEFINITIONS

Supports: Ch9, Ch18 | Timebox: 60 min | Participants: RevOps, Sales, Marketing, CS

Purpose: Create a shared understanding of every CRM and reporting field—its purpose, owner, and refresh schedule. Eliminate duplicate and unclear fields to protect data trust.

Use When: Before any process change, new tool implementation, or quarterly data hygiene audit.

WS-15 STAGE EXIT CRITERIA: EVIDENCE TO ADVANCE

Supports: Ch10, Ch18 | Timebox: 60 min | Participants: CEO/Founder, Sales, RevOps

Purpose: Define the concrete evidence required for each pipeline stage exit. Ensure stage accuracy, faster forecasting, and consistent buyer progression.

Use When: Before hiring, revising forecast models, or redefining sales stages.

WS-16 ROUTING SLAS AND RECYCLE RULES

Supports: Ch9, Ch7 | Timebox: 60 min | Participants: RevOps, SDR Lead, Marketing

Purpose: Set routing speed targets, disqualify logic, and recycle rules to keep leads fresh. Improve follow-up speed and accountability across teams.

Use When: After WS-11 or ahead of campaign launches where inbound and outbound intersect.

PRICING

WS-17 PRICING GIVE-GET BANDS & DISCOUNT GUARDRAILS

Supports: Ch11 | Timebox: 60 min | Participants: CEO or CRO, Sales, Finance, RevOps

Purpose: Establish discount guardrails with defined give-get rules to protect margins. Set approval thresholds and ensure trade-offs are consistent.

Use When: At the start of each quarter or before revising pricing or discount policies.

WS-18 DISCOUNT APPROVAL FLOW

Supports: Ch11, Ch18 | Timebox: 45 min | Participants: Sales, Finance, RevOps

Purpose: Define a clear flow for pricing exceptions and approvals. Speed up approvals while reducing uncontrolled discounts.

Use When: Alongside WS-17 or before adding new discount tiers or policies.

WS-19 PACKAGING TEST CARD

Supports: Ch11, Ch5 | Timebox: 60 min | Participants: Product, Sales

Purpose: Test new packaging or tiering hypotheses with clear metrics and thresholds: record offer details, audience, test window, and outcomes.

Use When: Before changing pricing, bundling, or packaging strategy.

HIRING

WS-20 AE SCORECARD: SKILLS, BEHAVIORS, EVIDENCE

Supports: Ch12 | Timebox: 60 min | Participants: CEO/Founder or CRO, Sales, HR

Purpose: Hire AEs using evidence-based criteria—skills, behaviors, and performance proof. Build consistency across hiring decisions.

Use When: Before interviews or when updating AE hiring standards.

WS-21 SDR SCORECARD: ACTIVITY, QUALITY, LEARNING VELOCITY

Supports: Ch12 | Timebox: 60 min | Participants: SDR Lead, HR

Purpose: Evaluate SDR candidates on the quality of activity, adaptability, and learning speed using structured tasks. Build a repeatable hiring process that predicts ramp success.

Use When: Before interviewing new SDRs or training a new cohort.

WS-22 “30-60-90” DAY PLAN: ENABLEMENT AND GO / NO-GO

Supports: Ch12, Ch10 | Timebox: 45 min | Participants: Manager, New Hire

Purpose: Design a structured 30-60-90 ramp plan with clear milestones and go/no-go reviews. Set expectations and track progress.

Use When: On a new hire’s first day or during onboarding redesign.

WS-23 RAMP MATH AND CAPACITY: QUOTA, PIPELINE NEEDS, PAYBACK

Supports: Ch12, Ch3 | Timebox: 60 min | Participants: Sales, Finance, RevOps

Purpose: Model hiring needs and ramp timelines using real funnel math. Quantify how many reps, leads, and deals are required to hit revenue targets.

Use When: During quarterly planning or before adding new headcount.

VOICE OF CUSTOMER

WS-24 VOC CAPTURE CARD: CONTEXT, QUOTES, PAIN, PROOF

Supports: Ch12, Ch5 | Timebox: 30 min per interview | Participants: any interviewer

Purpose: Standardize how your team captures voice-of-customer insights—context, verbatim quotes, pain points, and proof of value—so interviews become comparable data instead of anecdotes.

Use When: During ongoing customer interviews or feedback cycles; review monthly.

WS-25 TAXONOMY AND THEMES: CODE AND SPOT PATTERNS

Supports: Ch13 | Timebox: 60 min | Participants: Product, Sales, CS

Purpose: Build a shared vocabulary for customer feedback by tagging, coding, and ranking themes from capture cards. Expose the patterns driving churn, adoption, or delight.

Use When: Monthly or after at least 15 interviews.

WS-26 PRIORITIZATION SCORING MATRIX

Supports: Ch13, Ch15 | Timebox: 60 min | Participants: ELT, Product, GTM Leads

Purpose: Score competing opportunities using weighted criteria to surface the top 5 bets most likely to create impact.

Use When: During quarterly planning or roadmap reviews.

INVESTORS, BOARD, AND ADVISORS

WS-27 DECISION BRIEF: CONTEXT, OPTIONS, RISKS, RECOMMENDATIONS

Supports: Ch14, Ch17 | Timebox: 45 min | Participants: Owner and Reviewers

Purpose: Frame a high-impact decision on one page—summarizing context, options, risks, and recommendations—to speed up executive or board alignment.

Use When: Any time a major strategic choice requires clear framing or stakeholder input.

WS-28 VRMON RISK CARD

Supports: Ch14, Ch15 | Timebox: 45 min | Participants: ELT

Purpose: Track material risks and mitigation actions using the VRMON structure (Visible Risks, Mitigations, Options, Next step). Maintain a live risk register.

Use When: During monthly ELT or board risk reviews.

WS-29 INVESTOR UPDATE TEMPLATE

Supports: Ch14, Ch18 | Timebox: 60 min | Participants: CEO/Founder, Finance, RevOps

Purpose: Deliver honest, concise investor updates that combine facts, learnings, and clear asks for help.

Use When: Monthly or quarterly before board meetings.

SCALING

WS-30 GROWTH THESIS ONE-PAGER: WHY SCALE NOW?

Supports: Ch15, Ch17 | Timebox: 60 min | Participants: ELT

Purpose: State the evidence-based case for scaling a motion. Document why, what risks exist, and what thresholds must be met before expansion.

Use When: After repeatable wins or before committing new budget.

WS-31 CAPACITY MODEL: SOM AND SQL MODEL

Supports: Ch3, Ch17 | Timebox: 60 min | Participants: RevOps, Finance, Sales

Purpose: Calculate bottom-up ARR capacity using real funnel inputs (Reach, Meeting Rate, Pipeline Conversion, Win Rate, Deal Size). Create a defensible forecast tied to execution limits.

Use When: During quarterly planning or before scaling sales headcount.

WS-32 CHANNEL PORTFOLIO GUARDRAILS: CAPS, CUT RULES, MIX

Supports: Ch15 | Timebox: 45 min | Participants: ELT, Marketing, Sales

Purpose: Define channel caps, cut rules, and payback targets to prevent sprawl and wasted spend.

Use When: Quarterly or whenever budget allocation shifts.

REPORTING

WS-33 CEO DASHBOARD SETUP: 7 TO 10 KPIS

Supports: Ch18, Ch17 | Timebox: 60 min | Participants: CEO, RevOps, Finance

Purpose: Build a one-page, weekly-refreshed dashboard that drives executive decisions instead of vanity reporting.

Use When: During operating-cadence setup or dashboard redesign.

WS-34 METRIC CANON: DEFINITION, FORMULA, SOURCE, OWNER, REFRESH

Supports: Ch18 | Timebox: 60 min | Participants: RevOps, Finance

Purpose: Document every core metric's formula, source, owner, and refresh cadence to create one source of truth.

Use When: After WS-33 or whenever metric definitions diverge across teams.

WS-35 FORECAST RULES AND COMMIT CRITERIA: LANES AND ACCURACY CHECKS

Supports: Ch18, Ch10 | Timebox: 60 min | Participants: Sales, Finance, RevOps

Purpose: Define forecast lanes and commit rules tied to validated buyer evidence. Improve forecast accuracy and accountability.

Use When: Monthly or before quarterly forecast cycles.

ARTIFICIAL INTELLIGENCE

WS-36 AI POLICY ONE-PAGER: TRUTH, PRIVACY, HUMAN-IN-THE-LOOP

Supports: Ch19 | Timebox: 60 min | Participants: CEO, Legal, CISO, RevOps

Purpose: Set the foundational principles for responsible AI use—truth, privacy, and human oversight. Define acceptable use cases, limits, and approval process.

Use When: Before any AI tool deployment or data integration.

WS-37 PROMPT LIBRARY: GOAL, INPUTS, CONSTRAINTS, EXAMPLE

Supports: Ch19, Ch5, Ch6, Ch7, Ch9 | Timebox: 30

min per prompt | Participants: Function Lead, RevOps, CISO

Purpose: Create and test short, reliable prompts per function with a clear structure: goal, inputs, constraints, and example. Build a vetted prompt library.

Use When: After WS-36 or when standardizing AI-assisted tasks across teams.

WS-38 EVALUATION HARNESS: SAMPLE, SCORECARD, RED TEAM

Supports: Ch19 | Timebox: 60 min | Participants: Function Lead, RevOps, CISO

Purpose: Test AI outputs with controlled samples and scorecards to measure accuracy, reliability, and bias. Provide a repeatable evaluation framework.

Use When: Before AI rollout and quarterly for model validation.

WS-39 ANOMALY ALERTS PLAYBOOK: SLA MISS, STAGE CREEP, DISCOUNT DRIFT

Supports: Ch18, Ch19 | Timebox: 60 min | Participants: RevOps, Function Leads

Purpose: Define data and process alerts with thresholds and owners to detect issues early (SLA misses, forecast drift, discount anomalies).

Use When: After WS-33 and WS-34 or when building automated RevOps monitoring.