

Companions Worksheets

GO TO MARKET LIKE YOU MEAN IT

The Tactical Field Guide for Scaling SaaS Revenue

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How to Run 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.

1. Complete the **Quick Start Pack** in order: WS-01 to WS-05.
2. Pick one of the 11 additional **Topic Packs** (available with the book) that matches your gaps; then run one to two sheets over the next two weeks.
3. Review the results during the team's Weekly Business Review. Use pass or fail and keep or kill rules to decide on the next steps.
4. Note where you recorded this worksheet data so your team can find it.
5. Many worksheets create an output that other worksheets may need. Record the permanent location so your team can find and reuse it. Examples include a cloud drive folder or file, a CRM, or a shared notebook path.

Each worksheet follows a standard format for consistency. Not all fields and rubrics will apply in all situations. Leave sections blank if they are not relevant to your current stage, process, or test.

Sprints, Stages, and Signals

Stage Gate: Milestone in GTM maturity with evidence you must show to advance.

Sprint: Short, focused cycle; default is 2 weeks.

Timebox: Hard cap on meeting time.

Bet: Small, testable change expected to move one metric in a sprint.

Trigger: An observable event that increases the chance a buyer will act.

SLA: You will set, track, and audit specific response or processing times between teams.

Leak: Preventable drop-off in your funnel or process.

Pass or Fail: Threshold your test must meet to count as a win.




Keep or Kill: After one or two sprints, you apply a rule to keep or revert the change.

Two-sprint change log: Record of changes and outcomes over four weeks.

Data Trust Rubric:

- 1 Unknown or untracked
- 2 Sometimes tracked
- 3 Tracked but noisy
- 4 Tracked and usually trusted
- 5 Audited and used in weekly decisions.

Stage color rubric:

-  Evidence met and audited (green)
-  Partial or inconsistent (yellow)
-  Missing or unmeasured (red)

Quick Start Worksheets

WS-01 GTM SNAPSHOT

Supports: Ch1, Ch2 | Timebox: 60 minutes

Participants: CEO/Founder, Sales, Marketing, CS, RevOps

PURPOSE Align on what is true now across ICP, message, channels, process, proof, pricing, and capacity.	ONE METRIC (30 DAYS) Metric: Target: Cadence: weekly
WHEN TO USE The first week of a push. Repeat the process every two weeks and at each GTM Maturity Stage Gate.	SUCCESS METRIC Improve replies, win rate, or sales cycle by ≥10% in 2 weeks
OUTCOME A one-page snapshot that anchors the next two-week sprint.	TEST PASS OR FAIL Threshold and sample size: _____
AGENDA Set an objective and use facts only. Fill snapshot prompts. Choose 3 Problems and 3 Bets. Pick one metric to move, name the owner, and set weekly reviews.	KEEP OR KILL RULE Keep it if two consecutive sprints move the chosen metric. Review and revise if not.
INPUTS Last 90 days pipeline by stage, win and loss notes, ICP and messaging, live sequences, pricing sheet.	RUBRIC Data trust: <input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 Stage Status: <input type="checkbox"/> Green <input type="checkbox"/> Yellow <input type="checkbox"/> Red
OUTPUTS 1 final snapshot. 3 Problems and 3 Bets. 1 target metric with an owner.	COMMON MISTAKES Aspirations instead of facts, no SLAs or handoffs, no named owner for the metric
NEXT DECISIONS If ICP is vague, run WS-03. If the message is weak, run WS-04. If leaks are operational, run WS-15 and WS-16.	RECORD LOCATION Link/Path:

WS-02 GTM MATURITY STAGE ASSESSMENT

Supports: Ch2, Ch17 | Timebox: 60 minutes

Participants: CEO/Founder, Executive Team, RevOps

PURPOSE Score current GTM Maturity Stage, define missing evidence, and pick one weekly Bet per team.	ONE METRIC (30 DAYS) Metric: Target: Cadence: Weekly
WHEN TO USE After WS-01. Then, monthly and before big Bets.	SUCCESS METRIC Percentage of GTM Maturity Stage evidence items that move from red or yellow to green within 30 days.
OUTCOME GTM Maturity Stage scorecard with green, yellow, and red. Prioritized evidence. Two-sprint change log.	TEST PASS OR FAIL Write the thresholds for the selected items here.
AGENDA Score each stage gate using evidence. Name red and yellow items and causes. Choose bi-weekly Bet per team with a test pass or fail threshold and a rollback date. Log owners and review dates.	KEEP OR KILL RULE Keep it if at least half of the planned items turn green in 60 days. Otherwise, narrow scope.
INPUTS WS-01 snapshot. SQLs, win rate, sales cycle, discount, GRR, or NRR.	RUBRIC Data trust: <input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 Stage Status: <input type="checkbox"/> Green <input type="checkbox"/> Yellow <input type="checkbox"/> Red
OUTPUTS GTM Maturity Stage score. List of red and yellow evidence with owners. Two-sprint change log with dates.	COMMON MISTAKES Vague evidence. No saved link to evidence. No owner or date.
NEXT DECISIONS If ICP is weak, run WS-03. If the message is weak, run WS-04. If the process is weak, run WS-05.	RECORD LOCATION Link/Path:

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

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

<p>PURPOSE</p> <p>Define the buyer profile most likely to close quickly at full price. Capture triggers and real conversion evidence.</p>	<p>ONE METRIC (30 DAYS)</p> <p>Metric: Target: Cadence: Weekly</p>
<p>WHEN TO USE</p> <p>After WS-02. Refresh quarterly.</p>	<p>SUCCESS METRIC</p> <p>Higher reply rate and lower discount in targeted segments vs. control within 30 days.</p>
<p>OUTCOME</p> <p>ICP grid. Anti-ICP red flags. Targeting rules.</p>	<p>TEST PASS OR FAIL</p> <p>Write the threshold for lift vs control.</p>
<p>AGENDA</p> <p>List the top 3 segments by speed, price, and stick. Fill the grid with: Trait, Trigger, and Conversion Evidence. Write Anti-ICP red flags. Publish targeting rules, update sequences, and audiences.</p>	<p>KEEP OR KILL RULE</p> <p>Keep if targeted segments outperform by at least 10% in 30 days.</p>
<p>INPUTS</p> <p>Win and loss by segment. Time to close. Discount data. Usage or retention.</p>	<p>RUBRIC</p> <p>Data trust: <input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 Stage Status: <input type="checkbox"/> Green <input type="checkbox"/> Yellow <input type="checkbox"/> Red</p>
<p>OUTPUTS</p> <p>Completed ICP grid. Targeting rules (who to pursue and who to avoid). Trigger list for routing and research.</p>	<p>COMMON MISTAKES</p> <p>Traits without triggers. Hearsay instead of evidence. Ignoring Anti-ICP flags.</p>
<p>NEXT DECISIONS</p> <p>Feed triggers to Outbound and Inbound workflows. Update lead scoring rules in CRM.</p>	<p>RECORD LOCATION</p> <p>Link/Path:</p>

WS-04 MESSAGE TEST GRID: VARIANTS AND DECISIONS

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

<p>PURPOSE</p> <p>Test messaging variants in buyer language using thresholds instead of opinions.</p>	<p>ONE METRIC (30 DAYS)</p> <p>Metric: Target: Cadence: Weekly</p>
<p>WHEN TO USE</p> <p>After WS-03. Refresh monthly or when reply rate drops.</p>	<p>SUCCESS METRIC</p> <p>A variant beats baseline by the set threshold in the target segment.</p>
<p>OUTCOME</p> <p>A-B-C matrix with test pass or fail decisions, winning words library.</p>	<p>TEST PASS OR FAIL</p> <p>Write the threshold here.</p>
<p>AGENDA</p> <p>Set a threshold for pass or fail. Draft three variants: subject line and two-sentence body. Assign segments and volumes. Set review date. Publish to sequences or ads.</p>	<p>KEEP OR KILL RULE</p> <p>Keep a winner two sprints in a row. Kill losers.</p>
<p>INPUTS</p> <p>ICP grid. Current openers. Baseline reply rate.</p>	<p>RUBRIC</p> <p>Data trust: <input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 Stage Status: <input type="checkbox"/> Green <input type="checkbox"/> Yellow <input type="checkbox"/> Red</p>
<p>OUTPUTS</p> <p>A-B-C test matrix with pass or fail decisions—repository of proven messaging (winning words).</p>	<p>COMMON MISTAKES</p> <p>Testing too many variables. Underpowered sample. Not publishing the winner.</p>
<p>NEXT DECISIONS</p> <p>Feed proven messaging into your proof-of-value assets and objection bank. Refresh quarterly.</p>	<p>RECORD LOCATION</p> <p>Link/Path:</p>

WS-05 FIRST SALES PROCESS & MAP: A

TEACHABLE PATH

Supports: Ch8, Ch10 | **Timebox:** 90 minutes

Participants: Sales, RevOps, Top AEs, HR

<p>PURPOSE</p> <p>Document the path from first touch to close with exit evidence, SLAs, and a buyer-facing MAP.</p>	<p>ONE METRIC (30 DAYS)</p> <p>Metric: Target: Cadence: Weekly</p>
<p>WHEN TO USE</p> <p>Before hiring. Review every two weeks.</p>	<p>SUCCESS METRIC</p> <p>Pipeline stage accuracy $\geq 95\%$ and median sales cycle 10% shorter within 60 days.</p>
<p>OUTCOME</p> <p>Stage table with exit evidence and SLAs. One-page MAP template. Audit plan.</p>	<p>TEST PASS OR FAIL</p> <p>Write the thresholds here.</p>
<p>AGENDA</p> <p>Define 5 to 7 deal stages with exit criteria. Add SLAs, handoffs, and required fields. Draft a one-page MAP. Audit cadence for pipeline stage accuracy.</p>	<p>KEEP OR KILL RULE</p> <p>Keep if accuracy holds and sales cycle improves.</p>
<p>INPUTS</p> <p>Recent deals, loss reasons, typical infosec and legal needs, procurement steps.</p>	<p>RUBRIC</p> <p>Data trust: <input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 Stage Status: <input type="checkbox"/> Green <input type="checkbox"/> Yellow <input type="checkbox"/> Red</p>
<p>OUTPUTS</p> <p>Pipeline stage table. MAP template. Stage accuracy and SLA audit cadence.</p>	<p>COMMON MISTAKES</p> <p>Fuzzy exit evidence. Late legal and IT. No owner per field.</p>
<p>NEXT DECISIONS</p> <p>New stage definitions and required fields drive the handoffs between teams, with time limits. Define when a lead/deal goes back to nurturing (or to a rework queue) if it stalls or fails an exit criterion.</p>	<p>RECORD LOCATION</p> <p>Link/Path:</p>

Messaging Worksheets

WS-06 PROOF OF VALUE LIBRARY

Supports: Ch5, Ch10 | Timebox: 45 minutes

Participants: Product, Sales, CS

<p>PURPOSE</p> <p>Catalog proof-of-value assets and map them to pipeline stages.</p>	<p>ONE METRIC (30 DAYS)</p> <p>Metric: Target: Cadence: Weekly</p>
<p>WHEN TO USE</p> <p>Before the refresh periods and the pre-enterprise sales push.</p>	<p>SUCCESS METRIC</p> <p>Proof of value usage in stages $\geq 80\%$ and win rate lift on proof-used deals.</p>
<p>OUTCOME</p> <p>Table with asset, stage, owner, and link.</p>	<p>TEST PASS OR FAIL</p> <p>Define usage and lift thresholds.</p>
<p>AGENDA</p> <p>Inventory, map to stage, assign owners, list gaps.</p>	<p>KEEP OR KILL RULE</p> <p>Replace assets that are unused for two sales cycles in a row.</p>
<p>INPUTS</p> <p>Existing assets. Top objections.</p>	<p>RUBRIC</p> <p>Data trust: <input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 Stage Status: <input type="checkbox"/> Green <input type="checkbox"/> Yellow <input type="checkbox"/> Red</p>
<p>OUTPUTS</p> <p>Proof of value table. Gap list with owners.</p>	<p>COMMON MISTAKES</p> <p>Outdated assets, no owners, unclear stage mapping.</p>
<p>NEXT DECISIONS</p> <p>Create missing assets and add to enablement.</p>	<p>RECORD LOCATION</p> <p>Link/Path:</p>

WS-07 OBJECTION LIBRARY

Supports: Ch5, Ch10 | Timebox: 60 minutes

Participants: Product, Sales

PURPOSE Turn objections into responses with proof of value and a next step.	ONE METRIC (30 DAYS) Metric: Target: Cadence: Weekly
WHEN TO USE Before training new reps and after 10 losses.	SUCCESS METRIC Fewer stalls on the top 3 objections.
OUTCOME Bank with objection, response, proof of value, and next step.	TEST PASS OR FAIL Define stall rate reduction threshold.
AGENDA List top objections, write responses, attach proof, and define next step.	KEEP OR KILL RULE Replace responses that fail twice.
INPUTS Loss reasons. Call snippets.	RUBRIC Data trust: <input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 Stage Status: <input type="checkbox"/> Green <input type="checkbox"/> Yellow <input type="checkbox"/> Red
OUTPUTS Objection bank.	COMMON MISTAKES Vague responses and no proof.
NEXT DECISIONS Feed to training and sequences.	RECORD LOCATION Link/Path:

Outbound Worksheets

WS-08 TWO-WEEK OUTBOUND SPRINT PLAN

Supports: Ch6 | Timebox: 45 minutes

Participants: SDR lead, AE lead, RevOps

<p>PURPOSE</p> <p>Run a defined sprint with activity targets and review cadence.</p>	<p>ONE METRIC (30 DAYS)</p> <p>Metric: _____ Target: _____ Owner: _____ Cadence: Weekly</p>
<p>WHEN TO USE</p> <p>Start of every two-week outbound sprint.</p>	<p>SUCCESS METRIC</p> <p>Meetings booked and reply rate versus goal.</p>
<p>OUTCOME</p> <p>Sprint document with target list, opener, daily volume, and reviews.</p>	<p>TEST PASS OR FAIL</p> <p>Define numeric thresholds for both.</p>
<p>AGENDA</p> <p>Set goals, finalize lists, lock opener, and schedule reviews.</p>	<p>KEEP OR KILL RULE</p> <p>Keep elements that meet the pass threshold for two consecutive sprints; kill those that fail.</p>
<p>INPUTS</p> <p>ICP and triggers, capacity, and opener variants.</p>	<p>RUBRIC</p> <p>Data trust: <input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 Stage Status: <input type="checkbox"/> Green <input type="checkbox"/> Yellow <input type="checkbox"/> Red</p>
<p>OUTPUTS</p> <p>Sprint plan.</p>	<p>COMMON MISTAKES</p> <p>Over-scoping and weak lists.</p>
<p>NEXT DECISIONS</p> <p>Feed results to WS-10.</p>	<p>RECORD LOCATION</p> <p>Link/Path:</p>

WS-09 LEAD LIST QUALITY CHECKLIST

Supports: Ch6, Ch4 | Timebox: 30 minutes

Participants: SDR lead, RevOps

PURPOSE Enforce standards for outbound lists.	ONE METRIC (30 DAYS) Metric: Target: Cadence: Weekly
WHEN TO USE Before any send.	SUCCESS METRIC Pass rate at or above 90 percent.
OUTCOME Pass or fail checklist.	TEST PASS OR FAIL Threshold and sample size: _____
AGENDA Check ICP match, triggers present, email validity, and deduplicate.	KEEP OR KILL RULE Reject lists that fail.
INPUTS Prospect lists and ICP.	RUBRIC Data trust: <input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 Stage Status: <input type="checkbox"/> Green <input type="checkbox"/> Yellow <input type="checkbox"/> Red
OUTPUTS Approved or rejected list with fixes.	COMMON MISTAKES No triggers and stale data.
NEXT DECISIONS Tighten enrichment or vendors.	RECORD LOCATION Link/Path:

WS-10 OPENER VARIANTS TRACKER

Supports: Ch6, Ch5 | Timebox: 30 minutes

Participants: SDR lead, Product, RevOps

PURPOSE Track opener performance and decide weekly.	ONE METRIC (30 DAYS) Metric: Target: Cadence: Weekly
WHEN TO USE During each sprint.	SUCCESS METRIC Share of winners and reply lift.
OUTCOME Keep or kill decisions and next test.	TEST PASS OR FAIL Define reply threshold by segment.
AGENDA Review stats, compare to threshold, decide, publish.	KEEP OR KILL RULE Keep winners after two sprints, kill losers.
INPUTS Sequence stats.	RUBRIC Data trust: <input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 Stage Status: <input type="checkbox"/> Green <input type="checkbox"/> Yellow <input type="checkbox"/> Red
OUTPUTS Keep or kill decisions and next test.	COMMON MISTAKES Changing too much and not isolating variables.
NEXT DECISIONS Update WS-04 with learnings.	RECORD LOCATION Link/Path:

Inbound and PLG Worksheets

WS-11 FUNNEL ENTRY POINTS AND SLAS: ROUTES AND RESPONSE TIMES

Supports: Ch7, Ch9 | Timebox: 60 minutes
Participants: Marketing, Sales, CS, SDR Lead

<p>PURPOSE</p> <p>Define lead entry points, routes, and SLAs.</p>	<p>ONE METRIC (30 DAYS)</p> <p>Metric: Target: Cadence: Weekly</p>
<p>WHEN TO USE</p> <p>Quarterly and before new campaigns.</p>	<p>SUCCESS METRIC</p> <p>Achieved an SLA hit rate of 90% or higher and reduced leakage.</p>
<p>OUTCOME</p> <p>Entry points with route, SLA, and owner.</p>	<p>TEST PASS OR FAIL</p> <p>Define SLA and leakage thresholds.</p>
<p>AGENDA</p> <p>Inventory entry points, set SLAs, assign owners, publish rules.</p>	<p>KEEP OR KILL RULE</p> <p>Keep routes that meet SLA for two sprints.</p>
<p>INPUTS</p> <p>Current forms, chat, email, and trial flows.</p>	<p>RUBRIC</p> <p>Data trust: <input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 Stage Status: <input type="checkbox"/> Green <input type="checkbox"/> Yellow <input type="checkbox"/> Red</p>
<p>OUTPUTS</p> <p>Entry points, SLA table, and routing rules.</p>	<p>COMMON MISTAKES</p> <p>No owner and long forms.</p>
<p>NEXT DECISIONS</p> <p>Link to WS-16 routing and recycle.</p>	<p>RECORD LOCATION</p> <p>Link/Path:</p>

WS-12 ACTIVATION TRIGGERS MAP: PREDICTING PQLS

Supports: Ch7 | Timebox: 60 minutes

Participants: Product, Data, Sales, RevOps.

<p>PURPOSE</p> <p>Identify product events that predict buying.</p>	<p>ONE METRIC (30 DAYS)</p> <p>Metric: Target: Cadence: Weekly</p>
<p>WHEN TO USE</p> <p>Monthly in PLG motion.</p>	<p>SUCCESS METRIC</p> <p>Higher conversion from triggered accounts vs. control.</p>
<p>OUTCOME</p> <p>Event, threshold, signal strength, next touch.</p>	<p>TEST PASS OR FAIL</p> <p>Define lift threshold.</p>
<p>AGENDA</p> <p>List events, set thresholds, rank strength, and assign next touches.</p>	<p>KEEP OR KILL RULE</p> <p>Keep events that reach the pass threshold for two sprints.</p>
<p>INPUTS</p> <p>Product analytics, prior conversions.</p>	<p>RUBRIC</p> <p>Data trust: <input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 Stage Status: <input type="checkbox"/> Green <input type="checkbox"/> Yellow <input type="checkbox"/> Red</p>
<p>OUTPUTS</p> <p>Trigger map and alerts plan.</p>	<p>COMMON MISTAKES</p> <p>Overfitting the data model and too many events to generalize.</p>
<p>NEXT DECISIONS</p> <p>Set up automated triggers and routing rules that notify the right person (typically a Sales Assistant or AE) when a product-usage event indicates buying intent.</p>	<p>RECORD LOCATION</p> <p>Link/Path:</p>

WS-13 SALES-ASSIST HANDOFF CARD

Supports: Ch7, Ch10 | Timebox: 45 minutes

Participants: Sales, Product, CS, RevOps

PURPOSE Define rules for sales assist on PLC.	ONE METRIC (30 DAYS) Metric: Target: Cadence: Weekly
WHEN TO USE You have a working free trial or freemium funnel producing consistent signups. You can identify usage milestones (activation triggers) that signal when a user is likely ready to buy. Your volume of signups is large enough that not every trial can receive manual outreach, so you must define who gets help and how.	SUCCESS METRIC Conversion lift on assisted accounts.
OUTCOME Criteria, talk track, MAP-lite next step.	TEST PASS OR FAIL Define lift threshold.
AGENDA Set criteria, script the assist, define next step, publish.	KEEP OR KILL RULE Keep the sales assist motion that reaches the pass threshold for two sprints.
INPUTS Activation triggers and past assists.	RUBRIC Data trust: <input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 Stage Status: <input type="checkbox"/> Green <input type="checkbox"/> Yellow <input type="checkbox"/> Red
OUTPUTS Handoff card and training notes.	COMMON MISTAKES Late handoff and generic script.
NEXT DECISIONS Align with WS-05 MAP.	RECORD LOCATION Link/Path:

Process & RevOps Worksheets

WS-14 REVOPS FIELD DEFINITIONS

Supports: Ch9, Ch18 | Timebox: 60 minutes

Participants: RevOps, Sales, Marketing, CS

PURPOSE Define fields with their purpose and owner.	ONE METRIC (30 DAYS) Metric: Target: Cadence: Weekly
WHEN TO USE Before any process change and quarterly.	SUCCESS METRIC Field completeness and accuracy above 95%.
OUTCOME Field definitions with purpose, source, owner, and refresh.	TEST PASS OR FAIL Define thresholds.
AGENDA Inventory, define purpose, assign owner, set refresh.	KEEP OR KILL RULE Deprecate unused or misused fields that confuse the data.
INPUTS Current schema and reports.	RUBRIC Data trust: <input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 Stage Status: <input type="checkbox"/> Green <input type="checkbox"/> Yellow <input type="checkbox"/> Red
OUTPUTS Updated definitions.	COMMON MISTAKES Duplicate fields and no owner.
NEXT DECISIONS Link to WS-15 stage exits and WS-16 routing.	RECORD LOCATION Link/Path:

WS-15 STAGE EXIT CRITERIA MAP: EVIDENCE TO ADVANCE

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

<p>PURPOSE</p> <p>Validate exit evidence at each stage with the audit.</p>	<p>ONE METRIC (30 DAYS)</p> <p>Metric: _____ Target: _____ Owner: _____ Cadence: Weekly</p>
<p>WHEN TO USE</p> <p>Before hiring and before forecast changes.</p>	<p>SUCCESS METRIC</p> <p>Stage accuracy at or above 95%.</p>
<p>OUTCOME</p> <p>For each stage, define what proof is required, what document captures it, and who owns it.</p>	<p>TEST PASS OR FAIL</p> <p>Define the accuracy threshold.</p>
<p>AGENDA</p> <p>Define exits, attach docs, assign owners, and set audits.</p>	<p>KEEP OR KILL RULE</p> <p>Simplify the stages that miss accuracy in two reviews.</p>
<p>INPUTS</p> <p>Recent deals and loss reasons.</p>	<p>RUBRIC</p> <p>Data trust: <input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 Stage Status: <input type="checkbox"/> Green <input type="checkbox"/> Yellow <input type="checkbox"/> Red</p>
<p>OUTPUTS</p> <p>Exit criteria table and audit cadence.</p>	<p>COMMON MISTAKES</p> <p>Exit criteria are unclear. Required documentation is missing.</p>
<p>NEXT DECISIONS</p> <p>Align with WS-05 MAP and WS-35 forecast rules.</p>	<p>RECORD LOCATION</p> <p>Link/Path:</p>
<p>NOTES</p>	<p>OWNER & DUE DATE</p> <p>Owner: Date:</p>

WS-16 ROUTING SLAS AND RECYCLE RULES

Supports: Ch9, Ch7 | Timebox: 60 minutes

Participants: RevOps, SDR Lead, Marketing

<p>PURPOSE</p> <p>Set routing speed, disqualify, and recycle logic.</p>	<p>ONE METRIC (30 DAYS)</p> <p>Metric: Target: Cadence: Weekly</p>
<p>WHEN TO USE</p> <p>After WS-11 and before campaign launches.</p>	<p>SUCCESS METRIC</p> <p>SLA hit rate of 90% or higher and reduced stale leads.</p>
<p>OUTCOME</p> <p>Routes, timers, recycle reasons, and tasks.</p>	<p>TEST PASS OR FAIL</p> <p>Define thresholds.</p>
<p>AGENDA</p> <p>Map routes, set timers, define reasons for recycling, and publish.</p>	<p>KEEP OR KILL RULE</p> <p>Keep only the rules that hold for two reviews.</p>
<p>INPUTS</p> <p>Lead sources, current response times.</p>	<p>RUBRIC</p> <p>Data trust: <input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 Stage Status: <input type="checkbox"/> Green <input type="checkbox"/> Yellow <input type="checkbox"/> Red</p>
<p>OUTPUTS</p> <p>Routing and recycle plan.</p>	<p>COMMON MISTAKES</p> <p>No recycle and unclear ownership.</p>
<p>NEXT DECISIONS</p> <p>Audit weekly and tie to SDR incentives.</p>	<p>RECORD LOCATION</p> <p>Link/Path:</p>

Pricing Worksheets

WS-17 PRICING GIVE-GET BANDS: DISCOUNT GUARDRAILS

Supports: Ch11 | Timebox: 60 minutes

Participants: CEO or CRO, Sales, Finance, RevOps

PURPOSE Set discount bands with non-negotiable give-gets.	ONE METRIC (30 DAYS) Metric: Target: Cadence: Weekly
WHEN TO USE Before the start of each quarter.	SUCCESS METRIC Discount drift reduced and margin preserved.
OUTCOME Band table with give-get and approver.	TEST PASS OR FAIL Define drift and margin thresholds.
AGENDA Review history, define bands, set approval, and publish.	KEEP OR KILL RULE Adjust bands if they fail two quarters.
INPUTS Deal history and margin.	RUBRIC Data trust: <input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 Stage Status: <input type="checkbox"/> Green <input type="checkbox"/> Yellow <input type="checkbox"/> Red
OUTPUTS Give-get bands and approval rules.	COMMON MISTAKES Undefined give-gets and exception sprawl.
NEXT DECISIONS Link to WS-18 approvals	RECORD LOCATION Link/Path:

WS-18 DISCOUNT APPROVAL FLOW

Supports: Ch11, Ch18 | Timebox: 45 minutes

Participants: Sales, Finance, RevOps

PURPOSE Define exception flow and reasons.	ONE METRIC (30 DAYS) Metric: Target:: Cadence: Weekly
WHEN TO USE Alongside WS-17.	SUCCESS METRIC Fewer ad-hoc exceptions and faster approvals.
OUTCOME Flowchart, matrix, and log template.	TEST PASS OR FAIL Define targets.
AGENDA Map flow, set approvers, define reasons, publish.	KEEP OR KILL RULE Tighten if failures repeat.
INPUTS Past exceptions.	RUBRIC Data trust: <input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 Stage Status: <input type="checkbox"/> Green <input type="checkbox"/> Yellow <input type="checkbox"/> Red
OUTPUTS Approval flow and reason codes.	COMMON MISTAKES No reason codes and unclear authority.
NEXT DECISIONS Add to forecast checks in WS-35.	RECORD LOCATION Link/Path:

WS-19 PACKAGING TEST CARD

Supports: Ch11, Ch5 | Timebox: 60 minutes

Participants: Product, Sales

<p>PURPOSE</p> <p>Hypothesize the value metric and its tiers, with thresholds.</p>	<p>ONE METRIC (30 DAYS)</p> <p>Metric: Target: Cadence: Weekly</p>
<p>WHEN TO USE</p> <p>Before price changes</p>	<p>SUCCESS METRIC</p> <p>Higher ASP or take rate with equal or better win rate.</p>
<p>OUTCOME</p> <p>Offer, audience, threshold, window, result.</p>	<p>TEST PASS OR FAIL</p> <p>Define a numeric threshold.</p>
<p>AGENDA</p> <p>Draft the offer, set the audience, set the threshold, run, and decide.</p>	<p>KEEP OR KILL RULE</p> <p>Keep it if it reaches the pass threshold for two windows.</p>
<p>INPUTS</p> <p>Willingness to pay, usage data.</p>	<p>RUBRIC</p> <p>Data trust: <input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 Stage Status: <input type="checkbox"/> Green <input type="checkbox"/> Yellow <input type="checkbox"/> Red</p>
<p>OUTPUTS</p> <p>Test card and decision.</p>	<p>COMMON MISTAKES</p> <p>Price without value metric and tiny samples.</p>
<p>NEXT DECISIONS</p> <p>Update WS-17 and WS-18.</p>	<p>RECORD LOCATION</p> <p>Link/Path:</p>

Hiring Worksheets

WS-20 AE SCORECARD: SKILLS, BEHAVIORS, EVIDENCE

Supports: Ch12 | Timebox: 60 minutes

Participants: CEO/Founder or CRO, Sales, HR

<p>PURPOSE</p> <p>Evidence-based hiring for AEs.</p>	<p>ONE METRIC (30 DAYS)</p> <p>Metric: Target: Cadence: Weekly</p>
<p>WHEN TO USE</p> <p>Before interviews.</p>	<p>SUCCESS METRIC</p> <p>Ramp speed and quota attainment.</p>
<p>OUTCOME</p> <p>Skills and behaviors are evaluated using prompts and pass-fail rules.</p>	<p>TEST PASS OR FAIL</p> <p>Define thresholds by month.</p>
<p>AGENDA</p> <p>Define skills, write prompts, and set pass-fail rules.</p>	<p>KEEP OR KILL RULE</p> <p>Update after two hiring cycles.</p>
<p>INPUTS</p> <p>Top AE behaviors and failure modes.</p>	<p>RUBRIC</p> <p>Data trust: <input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 Stage Status: <input type="checkbox"/> Green <input type="checkbox"/> Yellow <input type="checkbox"/> Red</p>
<p>OUTPUTS</p> <p>Scorecard and interview kit.</p>	<p>COMMON MISTAKES</p> <p>Vague traits and no evidence.</p>
<p>NEXT DECISIONS</p> <p>Link to WS-22 "30-60-90"</p>	<p>RECORD LOCATION</p> <p>Link/Path:</p>

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

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

<p>PURPOSE</p> <p>Evidence-based hiring for SDRs.</p>	<p>ONE METRIC (30 DAYS)</p> <p>Metric: Target: Cadence: Weekly</p>
<p>WHEN TO USE</p> <p>Before interviews.</p>	<p>SUCCESS METRIC</p> <p>Meetings booked and reply rate.</p>
<p>OUTCOME</p> <p>Role thresholds and sample tasks.</p>	<p>TEST PASS OR FAIL</p> <p>Define targets by month.</p>
<p>AGENDA</p> <p>Define thresholds, create tasks, and set pass-fail rules.</p>	<p>KEEP OR KILL RULE</p> <p>Update after two cohorts.</p>
<p>INPUTS</p> <p>Top SDR patterns</p>	<p>RUBRIC</p> <p>Data trust: <input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 Stage Status: <input type="checkbox"/> Green <input type="checkbox"/> Yellow <input type="checkbox"/> Red</p>
<p>OUTPUTS</p> <p>Scorecard and task kit.</p>	<p>COMMON MISTAKES</p> <p>Focusing too much on activity volume without measuring quality.</p>
<p>NEXT DECISIONS</p> <p>Link to WS-08 sprint plan.</p>	<p>RECORD LOCATION</p> <p>Link/Path:</p>

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

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

<p>PURPOSE</p> <p>Structured 30-60-90 days ramp plan with go/no-go decision points at each of the 30-day periods..</p>	<p>ONE METRIC (30 DAYS)</p> <p>Metric: Target: Cadence: Weekly</p>
<p>WHEN TO USE</p> <p>First day of hire.</p>	<p>SUCCESS METRIC</p> <p>Review pass-fail rate and time to first deal.</p>
<p>OUTCOME</p> <p>Goals by month, enablement checklist, and pass-fail rate review.</p>	<p>TEST PASS OR FAIL</p> <p>Define each pass-fail rate of each threshold.</p>
<p>AGENDA</p> <p>Align on goals, confirm resources, and set reviews</p>	<p>KEEP OR KILL RULE</p> <p>Refine after two hires.</p>
<p>INPUTS</p> <p>Role targets and process.</p>	<p>RUBRIC</p> <p>Data trust: <input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 Stage Status: <input type="checkbox"/> Green <input type="checkbox"/> Yellow <input type="checkbox"/> Red</p>
<p>OUTPUTS</p> <p>Signed plan and review dates.</p>	<p>COMMON MISTAKES</p> <p>No enablement and vague goals.</p>
<p>NEXT DECISIONS</p> <p>Tie to WS-23 ramp math.</p>	<p>RECORD LOCATION</p> <p>Link/Path:</p>

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

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

PURPOSE Model capacity and hiring needs.	ONE METRIC (30 DAYS) Metric: Target: Cadence: Weekly
WHEN TO USE Quarterly planning.	SUCCESS METRIC Forecast accuracy and payback window.
OUTCOME Capacity sheet and hiring implications.	TEST PASS OR FAIL Define tolerances.
AGENDA Fill inputs, review outputs, and decide hires.	KEEP OR KILL RULE Update when the inputs drift.
INPUTS Win rate, sales cycle, deal size, SQL flow.	RUBRIC Data trust: <input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 Stage Status: <input type="checkbox"/> Green <input type="checkbox"/> Yellow <input type="checkbox"/> Red
OUTPUTS Capacity model and plan.	COMMON MISTAKES Overestimating capacity and ignoring sales cycle length.
NEXT DECISIONS Feed to WS-31 capacity model.	RECORD LOCATION Link/Path:

Voice of Customer Worksheets

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

Supports: Ch12, Ch5 | Timebox: 30 minutes per interview
 Participants: Any interviewer

<p>PURPOSE</p> <p>Standardize interviews and notes.</p>	<p>ONE METRIC (30 DAYS)</p> <p>Metric: Target: Cadence: Weekly</p>
<p>WHEN TO USE</p> <p>Ongoing</p>	<p>SUCCESS METRIC</p> <p>Complete and code at least X interviews per month.</p>
<p>OUTCOME</p> <p>Comparable notes and consent status.</p>	<p>TEST PASS OR FAIL</p> <p>Define monthly minimum.</p>
<p>AGENDA</p> <p>Record context, verbatim quotes, pain, proof.</p>	<p>KEEP OR KILL RULE</p> <p>Keep format if themes emerge.</p>
<p>INPUTS</p> <p>Interview audio or notes.</p>	<p>RUBRIC</p> <p>Data trust: <input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 Stage Status: <input type="checkbox"/> Green <input type="checkbox"/> Yellow <input type="checkbox"/> Red</p>
<p>OUTPUTS</p> <p>Capture card and tag set.</p>	<p>COMMON MISTAKES</p> <p>Leading questions and no quotes.</p>
<p>NEXT DECISIONS</p> <p>Feed to WS-25 taxonomy.</p>	<p>RECORD LOCATION</p> <p>Link/Path:</p>

WS-25 TAXONOMY AND THEMES: CODE AND SPOT PATTERNS

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

<p>PURPOSE</p> <p>Create a shared language for VoC.</p>	<p>ONE METRIC (30 DAYS)</p> <p>Metric: Target: Cadence: Weekly</p>
<p>WHEN TO USE</p> <p>Monthly or after 15 interviews.</p>	<p>SUCCESS METRIC</p> <p>Top themes drive the roadmap or campaigns.</p>
<p>OUTCOME</p> <p>Theme matrix by frequency and severity.</p>	<p>TEST PASS OR FAIL</p> <p>Define adoption threshold.</p>
<p>AGENDA</p> <p>Define tags, code samples, and rank themes.</p>	<p>KEEP OR KILL RULE</p> <p>Refresh tags quarterly.</p>
<p>INPUTS</p> <p>Capture cards.</p>	<p>RUBRIC</p> <p>Data trust: <input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 Stage Status: <input type="checkbox"/> Green <input type="checkbox"/> Yellow <input type="checkbox"/> Red</p>
<p>OUTPUTS</p> <p>Theme matrix and glossary.</p>	<p>COMMON MISTAKES</p> <p>Using too many tags, resulting in inconsistent themes.</p>
<p>NEXT DECISIONS</p> <p>Feed to WS-26 prioritization.</p>	<p>RECORD LOCATION</p> <p>Link/Path:</p>

WS-26 PRIORITIZATION SCORING MATRIX

Supports: Ch13, Ch15 | Timebox: 60 minutes

Participants: ELT, Product, GTM Leads

PURPOSE Rank opportunities.	ONE METRIC (30 DAYS) Metric: Target: Cadence: Weekly
WHEN TO USE Quarterly planning.	SUCCESS METRIC Percentage of top 5 priorities that achieve intended outcomes.
OUTCOME Scored backlog and top 5.	TEST PASS OR FAIL Define hit rate threshold.
AGENDA Score items, sort, and decide top 5.	KEEP OR KILL RULE Re-score monthly.
INPUTS Theme matrix and estimates.	RUBRIC Data trust: <input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 Stage Status: <input type="checkbox"/> Green <input type="checkbox"/> Yellow <input type="checkbox"/> Red
OUTPUTS Prioritized list.	COMMON MISTAKES Gaming the scores.
NEXT DECISIONS Feed to WS-30 growth thesis	RECORD LOCATION Link/Path:

Investors, Board Directors, and Advisors Worksheets

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

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

PURPOSE Frame a decision on one page.	ONE METRIC (30 DAYS) Metric: Target: Cadence: Weekly
WHEN TO USE Any high-impact choice.	SUCCESS METRIC Decision latency reduced.
OUTCOME Brief ready for ELT or board.	TEST PASS OR FAIL Define latency target.
AGENDA Fill sections, review, decide, and ask.	KEEP OR KILL RULE Keep if improves decisions.
INPUTS Data and options.	RUBRIC Data trust: <input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 Stage Status: <input type="checkbox"/> Green <input type="checkbox"/> Yellow <input type="checkbox"/> Red
OUTPUTS One-page brief.	COMMON MISTAKES No clear ask. No clear decision.
NEXT DECISIONS Log in to WS-28 risk card if needed.	RECORD LOCATION Link/Path:

WS-28 VRMON RISK CARD

Supports: Ch14, Ch15 | Timebox: 45 minutes

Participants: ELT

<p>PURPOSE</p> <p>Track material risks and actions using VRMON [Visible Risks, Mitigations, Options, Next step]</p>	<p>ONE METRIC (30 DAYS)</p> <p>Metric: Target: Cadence: Weekly</p>
<p>WHEN TO USE</p> <p>Monthly ELT review.</p>	<p>SUCCESS METRIC</p> <p>Risk exposure trends down.</p>
<p>OUTCOME</p> <p>Live risk register.</p>	<p>TEST PASS OR FAIL</p> <p>Define exposure threshold.</p>
<p>AGENDA</p> <p>Review top risks, update mitigations, and assign next steps.</p>	<p>KEEP OR KILL RULE</p> <p>Archive closed risks.</p>
<p>INPUTS</p> <p>Decision briefs, metrics.</p>	<p>RUBRIC</p> <p>Data trust: <input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 Stage Status: <input type="checkbox"/> Green <input type="checkbox"/> Yellow <input type="checkbox"/> Red</p>
<p>OUTPUTS</p> <p>Risk cards.</p>	<p>COMMON MISTAKES</p> <p>No owners.</p>
<p>NEXT DECISIONS</p> <p>Tied to WS-30 thesis.</p>	<p>RECORD LOCATION</p> <p>Link/Path:</p>

WS-29 INVESTOR UPDATE TEMPLATE

Supports: Ch14, Ch18. | Timebox: 60 minutes

Participants: CEO/Founder, Finance, RevOps

PURPOSE Deliver clear, factual, and actionable updates.	ONE METRIC (30 DAYS) Metric: _____ Target: _____ Owner: _____ Cadence: Weekly
WHEN TO USE Monthly or quarterly	SUCCESS METRIC Response rate and quality of help.
OUTCOME Update pack.	TEST PASS OR FAIL Define response threshold.
AGENDA Fill in the metrics, define the learnings, and ask.	KEEP OR KILL RULE Iterate after two cycles.
INPUTS KPI deck and narrative.	RUBRIC Data trust: <input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 Stage Status: <input type="checkbox"/> Green <input type="checkbox"/> Yellow <input type="checkbox"/> Red
OUTPUTS Clear, concise, honest update.	COMMON MISTAKES Using vanity metrics. No explicit asks for help. Not honest in reporting.
NEXT DECISIONS Add to board pack.	RECORD LOCATION Link/Path:
NOTES	OWNER & DUE DATE Owner: Date:

Scaling Worksheets

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

Supports: Ch15, Ch17. | Timebox: 60 minutes
Participants: ELT

PURPOSE State the case to scale a motion.	ONE METRIC (30 DAYS) Metric: Target: Cadence: Weekly
WHEN TO USE After repeatable wins.	SUCCESS METRIC Scale decisions that hit targets.
OUTCOME Written thesis with risks and thresholds.	TEST PASS OR FAIL Define targets for scale.
AGENDA Define rationale, list risks, set thresholds, and decision date.	KEEP OR KILL RULE Revisit if targets miss two sprints.
INPUTS Performance by channel and segment.	RUBRIC Data trust: <input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 Stage Status: <input type="checkbox"/> Green <input type="checkbox"/> Yellow <input type="checkbox"/> Red
OUTPUTS Thesis and decision date.	COMMON MISTAKES Scaling noise.
NEXT DECISIONS Link to WS-32 guardrails.	RECORD LOCATION Link/Path:

WS-31 CAPACITY MODEL: SOM AND SQL MODEL

Supports: Ch3, Ch17. | Timebox: 60 minutes

Participants: RevOps, Finance, Sales

<p>PURPOSE</p> <p>Bottom-up ARR capacity.</p>	<p>ONE METRIC (30 DAYS)</p> <p>Metric: Target: Cadence: Weekly</p>
<p>WHEN TO USE</p> <p>Quarterly planning.</p>	<p>SUCCESS METRIC</p> <p>Forecast error remains within the company's set tolerance range (e.g., ±10%).</p>
<p>OUTCOME</p> <p>Monthly and annual capacity calculated from: Reach (R), Meeting rate (M), Pipeline conversion (P), Win rate (W), Deal size (S), SQLs per month (SQLm), Conversion rate (CR), Deal size (DS), multiplied by 12, divided by Sales cycle length (SC). See Glossary for definitions.</p>	<p>TEST PASS OR FAIL</p> <p>Threshold and sample size: _____</p>
<p>AGENDA</p> <p>Input data, compute capacity, compare methods, and decide plans.</p>	<p>KEEP OR KILL RULE</p> <p>Update when inputs drift.</p>
<p>INPUTS</p> <p>Reachable accounts, meeting rate, pipeline rate, win rate, deal size, sales cycle, and SQLs per month.</p>	<p>RUBRIC</p> <p>Data trust: <input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 Stage Status: <input type="checkbox"/> Green <input type="checkbox"/> Yellow <input type="checkbox"/> Red</p>
<p>OUTPUTS</p> <p>Capacity sheet and hiring implications.</p>	<p>COMMON MISTAKES</p> <p>Ignoring sales cycle and hiring limits.</p>
<p>NEXT DECISIONS</p> <p>Link to WS-23 ramp math.</p>	<p>RECORD LOCATION</p> <p>Link/Path:</p>

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

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

PURPOSE Set guardrails to avoid channel sprawl.	ONE METRIC (30 DAYS) Metric: Target Cadence: Weekly
WHEN TO USE Quarterly.	SUCCESS METRIC Mix stays within caps and payback within the target.
OUTCOME Guardrail table and review agenda.	TEST PASS OR FAIL Define caps and payback targets.
AGENDA Review CAC, set caps, define cuts, and publish.	KEEP OR KILL RULE Cut channels that miss two reviews.
INPUTS Channel CAC and payback.	RUBRIC Data trust: <input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 Stage Status: <input type="checkbox"/> Green <input type="checkbox"/> Yellow <input type="checkbox"/> Red
OUTPUTS Guardrails and cut rules.	COMMON MISTAKES Too many channels.
NEXT DECISIONS Feed to budget planning.	RECORD LOCATION Link/Path:

Reporting Worksheets

WS-33 CEO DASHBOARD SETUP: 7 TO 10 KPIS

Supports: Ch18, Ch17 | Timebox: 60 minutes

Participants: CEO, RevOps, Finance

<p>PURPOSE</p> <p>Build a one-page dashboard that refreshes fast.</p>	<p>ONE METRIC (30 DAYS)</p> <p>Metric: _____ Target: _____ Owner: _____ Cadence: Weekly</p>
<p>WHEN TO USE</p> <p>Weekly.</p>	<p>SUCCESS METRIC</p> <p>Dashboard refreshes in under 60 minutes and is used in weekly decision-making.</p>
<p>OUTCOME</p> <p>Dashboard with owner, target, last week, this week, and trend.</p>	<p>TEST PASS OR FAIL</p> <p>Define refresh and usage thresholds.</p>
<p>AGENDA</p> <p>Select KPIs, set targets, map sources, and build a view.</p>	<p>KEEP OR KILL RULE</p> <p>Swap KPIs that do not drive decisions.</p>
<p>INPUTS</p> <p>Metric definitions and sources.</p>	<p>RUBRIC</p> <p>Data trust: <input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 Stage Status: <input type="checkbox"/> Green <input type="checkbox"/> Yellow <input type="checkbox"/> Red</p>
<p>OUTPUTS</p> <p>Live dashboard.</p>	<p>COMMON MISTAKES</p> <p>Vanity KPIs and stale data.</p>
<p>NEXT DECISIONS</p> <p>Link to WS-34 metric canon.</p>	<p>RECORD LOCATION</p> <p>Link/Path:</p>

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

Supports: Ch18 | Timebox: 60 minutes

Participants: RevOps, Finance

<p>PURPOSE</p> <p>Create one source of truth for metrics.</p>	<p>ONE METRIC (30 DAYS)</p> <p>Metric: Target: Cadence: Weekly</p>
<p>WHEN TO USE</p> <p>With WS-33.</p>	<p>SUCCESS METRIC</p> <p>Disputes drop, and refresh cadence holds.</p>
<p>OUTCOME</p> <p>Canon table for all KPIs.</p>	<p>TEST PASS OR FAIL</p> <p>Define dispute and refresh thresholds.</p>
<p>AGENDA</p> <p>List metrics, define fields and formulas, set owners, and refresh.</p>	<p>KEEP OR KILL RULE</p> <p>Remove metrics not used in decisions.</p>
<p>INPUTS</p> <p>Current reports and definitions.</p>	<p>RUBRIC</p> <p>Data trust: <input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 Stage Status: <input type="checkbox"/> Green <input type="checkbox"/> Yellow <input type="checkbox"/> Red</p>
<p>OUTPUTS</p> <p>Canon and ownership.</p>	<p>COMMON MISTAKES</p> <p>Different teams use multiple definitions for the same metric.</p>
<p>NEXT DECISIONS</p> <p>Tie to WS-35 forecast rules.</p>	<p>RECORD LOCATION</p> <p>Link/Path:</p>

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

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

<p>PURPOSE</p> <p>Define forecast lanes and commit rules tied to MAP.</p>	<p>ONE METRIC (30 DAYS)</p> <p>Metric: _____ Target: _____ Owner: _____ Cadence: Weekly</p>
<p>WHEN TO USE</p> <p>Monthly.</p>	<p>SUCCESS METRIC</p> <p>Accuracy within tolerance at 30, 60, 90 days.</p>
<p>OUTCOME</p> <p>Forecast operating system and accuracy review.</p>	<p>TEST PASS OR FAIL</p> <p>Define tolerances.</p>
<p>AGENDA</p> <p>Set lane rules, tie commit to MAP, set accuracy checks.</p>	<p>KEEP OR KILL RULE</p> <p>Adjust rules that fail for two months.</p>
<p>INPUTS</p> <p>Stage exits, MAP, and historical accuracy.</p>	<p>RUBRIC</p> <p>Data trust: <input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 Stage Status: <input type="checkbox"/> Green <input type="checkbox"/> Yellow <input type="checkbox"/> Red</p>
<p>OUTPUTS</p> <p>Lane rules, commit criteria, and accuracy process.</p>	<p>COMMON MISTAKES</p> <p>Making a forecast commit without validated buyer evidence.</p>
<p>NEXT DECISIONS</p> <p>Wire alerts in WS-39.</p>	<p>RECORD LOCATION</p> <p>Link/Path:</p>

AI Worksheets

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

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

PURPOSE Set rules for AI use.	ONE METRIC (30 DAYS) Metric: Target: Cadence: Weekly
WHEN TO USE Before any AI deployment.	SUCCESS METRIC Policy adoption and zero violations.
OUTCOME Signed policy and access rules.	TEST PASS OR FAIL Define the adoption target.
AGENDA Draft principles, define use cases and limits, set logging, and approve.	KEEP OR KILL RULE Review quarterly.
INPUTS Compliance and risk posture.	RUBRIC Data trust: <input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 Stage Status: <input type="checkbox"/> Green <input type="checkbox"/> Yellow <input type="checkbox"/> Red
OUTPUTS Policy document.	COMMON MISTAKES No logging and unclear ownership.
NEXT DECISIONS Build a prompt library in WS-37.	RECORD LOCATION Link/Path:

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

Supports: Ch19, Ch5, Ch6, Ch7, Ch9 | **Timebox:** 30 minutes per prompt
Participants: Function Lead, RevOps, CISO

<p>PURPOSE</p> <p>Create short, reliable prompts per function.</p>	<p>ONE METRIC (30 DAYS)</p> <p>Metric: Target: Cadence: Weekly</p>
<p>WHEN TO USE</p> <p>After WS-36.</p>	<p>SUCCESS METRIC</p> <p>Time saved or quality lift.</p>
<p>OUTCOME</p> <p>Prompt cards with example outputs and a reviewer.</p>	<p>TEST PASS OR FAIL</p> <p>Define a threshold per task.</p>
<p>AGENDA</p> <p>Pick tasks, write prompts, test, add examples, and publish.</p>	<p>KEEP OR KILL RULE</p> <p>Kill prompts that fail two reviews.</p>
<p>INPUTS</p> <p>Tasks and sample data.</p>	<p>RUBRIC</p> <p>Data trust: <input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 Stage Status: <input type="checkbox"/> Green <input type="checkbox"/> Yellow <input type="checkbox"/> Red</p>
<p>OUTPUTS</p> <p>Prompt library</p>	<p>COMMON MISTAKES</p> <p>Vague prompts and no examples.</p>
<p>NEXT DECISIONS</p> <p>Add to enablement.</p>	<p>RECORD LOCATION</p> <p>Link/Path:</p>

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

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

PURPOSE Test AI outputs with a standard scorecard.	ONE METRIC (30 DAYS) Metric: Target: Cadence: Weekly
WHEN TO USE Before the AI rollout and then quarterly.	SUCCESS METRIC Scores at or above threshold.
OUTCOME Sample set and scorecard with thresholds.	TEST PASS OR FAIL Define threshold.
AGENDA Build a sample set, define scores, test, and decide.	KEEP OR KILL RULE Keep only models that reach the pass threshold for two consecutive review cycles.
INPUTS Real tasks, grounded in truth.	RUBRIC Data trust: <input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 Stage Status: <input type="checkbox"/> Green <input type="checkbox"/> Yellow <input type="checkbox"/> Red
OUTPUTS Scores and decisions.	COMMON MISTAKES Tiny samples and unclear scoring.
NEXT DECISIONS Wire alerts in WS-39	RECORD LOCATION Link/Path:

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

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

PURPOSE Define alerts and routing with owners.	ONE METRIC (30 DAYS) Metric: Target: Cadence: Weekly
WHEN TO USE After WS-33 and WS-34.	SUCCESS METRIC Time to detect and time to resolve.
OUTCOME Alert definitions with explanations and owners.	TEST PASS OR FAIL Define thresholds.
AGENDA Pick alerts, set thresholds, route, publish.	KEEP OR KILL RULE Kill noisy alerts.
INPUTS KPI thresholds and processes.	RUBRIC Data trust: <input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> 5 Stage Status: <input type="checkbox"/> Green <input type="checkbox"/> Yellow <input type="checkbox"/> Red
OUTPUTS Alert list and routing rules.	COMMON MISTAKES Creating too many alerts or failing to assign a clear owner.
NEXT DECISIONS Review weekly and prune monthly.	RECORD LOCATION Link/Path: