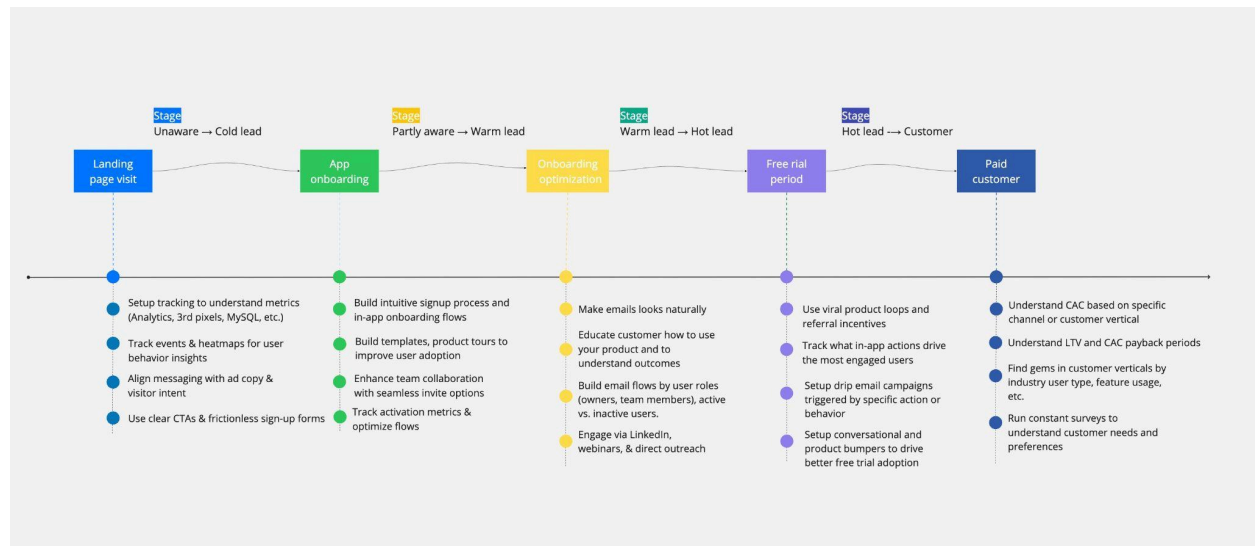


Ultimate PLG Framework with 100+ Proven Action Items SaaS Best Practices Included



Introduction

Hi, I'm Jovan — SaaS Growth Strategist and Division Leader at [Impactable](#). Over the past decade, I've helped more than 100 B2B SaaS companies scale faster by building performance-driven marketing systems, aligning go-to-market strategy with product development, and leading high-performing teams across paid media, martech, CRO, and customer acquisition.

This guide is the result of that hands-on experience.

Whether you're a founder, growth lead, or part of a SaaS marketing or product team, you've likely realized this: building a successful SaaS business isn't just about launching a great product. It's about creating a repeatable, scalable system for turning awareness into adoption, users into loyal customers, and growth into a sustainable engine.

That's where Product-Led Growth comes in — and this guide is designed to give you everything you need to execute it.

What This eBook Is

This is not a theoretical playbook filled with fluff or overused frameworks. It's a **battle-tested PLG operating system**—designed with 100+ actionable tips and best practices that can be implemented across your product, marketing, sales, and customer success teams.

Each stage of the framework is broken down clearly:

- From the first click to retained customer
- From onboarding and activation to conversion and expansion
- With role-specific responsibilities, tools, checklists, and real-world recommendations

Why It Matters

PLG isn't just a trend—it's a shift in how modern SaaS companies grow. But PLG isn't a "just add water" strategy. It requires clarity, structure, and a deep understanding of how every touchpoint—from website visit to feature usage—impacts revenue.

This guide will show you how to:

- ✓ Simplify onboarding and accelerate time-to-value
- ✓ Track the metrics that actually move the needle
- ✓ Improve user activation, retention, and expansion
- ✓ Build an infrastructure that scales—without over-relying on sales teams

If you want a smarter, faster, more predictable way to grow your SaaS, this framework was built for you.

Let's get into it.

A handwritten signature in black ink, appearing to read "J. M. Smith". The signature is fluid and stylized, with a large, sweeping loop at the end.

SaaS Division Leader @ Impactable

Stage 1: Unaware → Problem Aware Lead (Landing Page Visit)

Goals: Capture attention, generate interest, and drive conversions by providing relevant information and engaging experiences.

Description: This stage focuses on capturing attention through optimized landing pages, strategic messaging, robust tracking, and personalized experiences.

✅ Tips & Best Practices:

Implement Robust Tracking & Analytics

- **Set Up Advanced Analytics Systems:**
 - Use tools like **Google Analytics 4 (GA4)**, **Mixpanel**, **Matomo Analytics**, **Amplitude** for comprehensive tracking.
 - Define and configure Enhanced Measurement features (scroll tracking, site search, file downloads).
- **Integrate Ad Network Pixels:**
 - Implement **Facebook Pixel**, **LinkedIn Insight Tag**, **Google Ads Conversion Tag**, **Twitter Pixel**, **Quora Pixel**, etc.
 - Build remarketing audiences based on website interaction.
- **Visitor Identification Tools:**
 - Implement tools like **DemandSense**, **Clearbit Reveal**, **Leadfeeder** to identify and track high-value visitors.
- **Data Storage & Custom Dashboards:**
 - Use **MySQL**, **BigQuery**, or **Snowflake** for storing user data.
 - Build customized dashboards for real-time tracking of critical metrics like traffic sources, form submissions, and bounce rates.

🔧 **Recommended tools:** GA4, Mixpanel, Amplitude, Matomo Analytics, Hotjar, Crazy Egg, DemandSense, Leadfeeder, Clearbit Reveal, BigQuery, Snowflake.

Optimize Landing Page Messaging

- **Message Alignment:**
 - Ensure ad copy and landing page content are consistent to reduce bounce rates.
 - Include keyword-rich headlines, subheadings, and descriptions for SEO optimization.

- **Use Value-Driven CTAs:**
 - Test various CTAs such as “Book a Free Strategy Call,” “Get a Personalized Demo,” and “Start Free Trial.”
- **Leverage Social Proof & Trust Signals:**
 - Showcase testimonials, case studies, awards, partnerships, and industry recognitions.
 - Utilize stats (e.g., “\$100M of Revenue Generated”) to build authority.
- **Implement AI-Powered Copywriting Strategies:**
 - Use tools like [Copy.ai](#), Jasper, Writesonic to generate optimized content.
 - A/B test different variations to identify high-performing messaging.
- **Advanced Personalizations:**
 - Use tools like Mutiny, Hyperise, or RightMessage to personalize landing page content based on visitor data.


Improve Landing Page Experience

- **Form Optimization:**
 - Keep forms short with essential fields only (Name, Email, Company Name).
 - Minimize form fields and use progressive profiling.
 - Use Typeform or Paperform for improved UX.
 - Provide multi-step forms to enhance engagement.
 - Offer social sign-ups (Google, LinkedIn, Microsoft) to reduce friction.
- **Live Chat & Chatbots:**
 - Implement conversational bumpers (Drift, Intercom) to capture leads and provide real-time support.
 - Use conversational bumpers triggered by user behavior.
- **Mobile Optimization:**
 - Ensure seamless experience across mobile, tablet, and desktop devices with responsive design frameworks (Bootstrap, Tailwind CSS).
 - Use Accelerated Mobile Pages (AMP) for faster loading speeds.
- **Page Speed Optimization:**
 - Compress images, minify code, and leverage Content Delivery Networks (CDN).
 - Compress images using tools like TinyPNG or ShortPixel.
 - Minify CSS, JavaScript, and HTML files.
 - Use CDNs (Cloudflare, Akamai) to improve loading speeds.
 - Test page speed using tools like GTMetrix, Pingdom, and Google PageSpeed Insights.
- **Session Replay & Heatmaps:**
 - Use FullStory or Hotjar to visualize user behavior.
 - Identify areas where users drop off and optimize for better retention.

 **ToolStack recommendation:** Drift, Intercom, Tidio, HubSpot, Userpilot, WalkMe.

Conversion Rate Optimization (CRO)

- **Dynamic Personalization:**
 - Use Optimizely or VWO to deliver customized messages to returning visitors.
 - Implement geo-targeted messaging for different audiences.
 - Tailor offers and CTAs based on user segments (returning users, new visitors).
- **A/B Testing:**
 - Test multiple variations of **headlines, CTAs, page layout, visuals, and button colors.**
 - Continuously monitor split-test results and iterate based on data.
- **Exit-Intent Technology:**
 - Trigger pop-ups or offers when users attempt to leave the page.
 - Offer downloadable content, free guides, or consultations to re-engage website visitors.
- **Retargeting Campaigns:**
 - Build remarketing audiences from users who visited landing pages but didn't convert and push these audiences to ad networks.
 - Build remarketing campaigns on **Google Ads, Facebook Ads, LinkedIn Ads** to bring users back.
- **Heatmaps & Click Tracking:**
 - Visualize user behavior with tools like **Hotjar, Crazy Egg, or FullStory.**
 - Identify friction points and optimize click-through rates.

 **ToolStack recommendation:** Optimizely, VWO, Crazy Egg, OptinMonster, Sleeknote, Typeform, Qualaroo

Checklist Summary

- [] Implement comprehensive analytics systems (GA4, Mixpanel, MySQL).
 - [] Configure 3rd-party pixels and build remarketing audiences.
 - [] Set up heatmaps and session recordings.
 - [] Design & test landing page variations (copy, layout, CTAs).
 - [] Personalize messaging with tools like Mutiny and RightMessage.
 - [] Test various CTAs and page layouts through A/B testing.
 - [] Continuously optimize page speed and performance.
 - [] Create retargeting campaigns for non-converters.
 - [] Monitor analytics dashboards and refine conversion paths.
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Roles & Responsibilities

- **MarTech Specialist:** Implement tracking systems, 3rd-party pixels, and audience building.
 - **CRO Expert:** Design and execute A/B tests, optimize CTAs and layouts.
 - **Web Developer:** Implement tracking tags, personalize content, and enhance UX.
 - **Copywriter:** Create tailored messaging aligned with paid ads and SEO best practices.
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Stage 2: Problem Aware → Solution Aware (App Onboarding)

Goal: Deliver a seamless and engaging onboarding experience to drive activation and product adoption.

Description: Enhance user journey from sign-up to activation with product bumpers such as interactive walkthroughs, guided tutorials, and personalized onboarding flows.

✓ Tips & Best Practices:


Simplify Sign-Up Process:

- **Reduce Friction:**
 - Only ask for essential details during sign-up (email, name, company name).
 - Enable Single Sign-On (SSO) for enterprise clients.
 - Provide social sign-up options (Google, LinkedIn, Microsoft).
 - **Real-Time Feedback:**
 - Show instant validation errors or success messages during sign-up (e.g., invalid email formats).
 - Show progress bars for multi-step forms to enhance clarity.
 - Offer live chat support during the sign-up process.
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Build Effective Onboarding Flows:


- **Create Interactive Walkthroughs, Product Tours and Tutorials:**
 - Use tools like Userpilot, WalkMe, and Appcues to build guided tours.
 - Implement checklist-based onboarding to track progress completion.
 - Provide tooltips, checklists, and progress indicators to enhance UX.
 - Trigger specific guides based on user actions (e.g., first login, feature discovery).
- **Build Checklist-Based Onboarding Process**
 - Clearly outline steps required to achieve value from your product.

- Provide badges or rewards when users complete milestones.
- **Personalized Welcome Emails & Guides:**
 - Send personalized welcome messages and product setup guides.
 - Trigger in-app messages and reminders to ensure users complete key actions.
 - Send tailored welcome messages based on user role (e.g., Founder, Marketer, Developer).
 - Provide relevant resources (e.g., setup guides, best practices, use-case examples).
- **Create A Dedicated Knowledge Base:**
 - Send personalized welcome messages and product setup guides.
 - Integrate resources directly into the product's onboarding flow.

 **ToolStack recommendation:** Userpilot, WalkMe, Appcues, Chameleon, UserGuiding, Pendo.

Enhance User Collaboration & Integrations

- **Build Seamless Collaboration Features:**
 - Make it easy for users to invite teammates with direct links and custom invite emails.
 - Provide incentives for inviting collaborators (e.g., extended trial, special features).
- **Native Integrations:**
 - Build direct integrations with popular tools used by your target audience (e.g., CRM, project management tools).
 - Provide templates or use-case examples to showcase integrations.
 - Develop comprehensive guides on connecting your tool with other platforms.
 - Include visual step-by-step instructions for ease of use.
- **User Role Segmentation:**
 - Categorize users by role (e.g., Admins, Users, Developers).
 - Tailor onboarding experiences based on role-specific needs.

 **ToolStack recommendation:** Zapier, Slack, Salesforce, HubSpot, Make (Integromat), [Tray.io](https://tray.io).

Track User Activation Milestones:

- **Define Key Milestones:**
 - Account setup, dashboard creation, first integration, project completion, etc.
 - Set up triggers to track these actions in analytics tools.
- **Monitor User Activity Logs:**
 - Identify drop-off points and bottlenecks.
 - Compare activation rates by cohort (e.g., by signup date, campaign source, user type).
 - Measure user retention over time to evaluate onboarding effectiveness.
- **Cohort Analysis:**

- Compare activation rates over time and across various user segments.
- Build retention and engagement strategies for low-performing cohorts.

Checklist Summary:

- [] Simplify sign-up forms and enable social sign-ups.
 - [] Build guided tours and interactive tutorials.
 - [] Set up automated onboarding email sequences.
 - [] Monitor activation metrics via Mixpanel, Amplitude, etc.
 - [] Provide seamless integrations and collaboration options.
 - [] Create a dedicated knowledge base with role-specific guides.
 - [] Continuously refine the onboarding process based on user feedback.
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Roles & Responsibilities:

- **Product Manager:** Design user onboarding experiences and monitor metrics.
 - **UX/UI Designer:** Create engaging onboarding interfaces and visuals.
 - **Customer Success Specialist:** Provide early-stage guidance and support.
 - **MarTech Specialist:** Implement tracking tools and email automation.
 - **Growth Specialist:** Monitor activation metrics, optimize flows, and ensure retention.
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Stage 3: Solution Aware → Hot Lead (Email Automation Campaigns)

Goal: Enhance engagement with targeted email campaigns, deepen product familiarity, and improve conversion rates by optimizing the onboarding experience..

Tips & Best Practices:

Personalize User Communication:

- **Create Tailored Email Campaigns:**
 - Segment users based on behavior, role, usage patterns, and engagement level.
 - Trigger automated email sequences based on key events (e.g., user inactivity, milestone achievements, feature discovery).
 - Include personalized recommendations (e.g., "Try Feature X to boost productivity by 30%").

- Use marketing automation platforms like [Customer.io](#), Marketo, or HubSpot for tailored communication.
 - **Implement Trigger-Based Campaigns:**
 - Implement automated emails triggered by specific actions (e.g., completing onboarding, abandoning a setup process).
 - Send reminders or nudges based on user inactivity.
 - Send tailored content based on user behavior.
 - Implement behavioral scoring models. Score users based on engagement metrics, activation events, and frequency of interactions.
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Checklist Summary:

- ☐ Create segmented email campaigns triggered by user activity.
 - ☐ Build interactive, role-specific guides and content libraries.
 - ☐ Host webinars, live demos, and Q&A sessions for education.
 - ☐ Implement personalized dashboards and messaging.
 - ☐ Continuously monitor and refine user engagement workflows.
 - ☐ Create segmented email campaigns triggered by user activity.
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Roles & Responsibilities:

- **Content Strategist:** Develop tailored content resources, guides, and interactive materials.
- **Email Marketing Specialist:** Build and optimize segmented email sequences.
- **Customer Success Manager:** Engage with users via demos, webinars, and direct outreach.
- **Growth Specialist:** Track engagement metrics, optimize messaging, and enhance workflows.

Stage 4: Hot Lead → Customer (Free Trial Period)

Goal: Convert free trial users into paying customers through tailored engagement, strategic offers, and conversion-focused workflows.

Tips & Best Practices:

Strategic Conversion Offers:

- **Tailored Pricing plans:**
 - Offer personalized pricing plans based on user behavior and engagement.
 - Implement dynamic pricing models (usage-based billing, subscription tiers, pay-per-use).
 - Provide discounted annual plans or free trial extensions as conversion incentives.
- **Time-Sensitive Offers:**
 - Use limited-time discounts to create urgency (e.g., “Get 20% Off When You Upgrade Within 7 Days”)
 - Display countdown timers in emails, landing pages, and dashboards to create urgency.
 - Implement smart discounting tactics, such as providing tailored discount codes to high-value users.
- **Feature Unlocks & Usage Thresholds:**
 - Allow users to experience premium features during their trial.
 - Use behavioral nudges to highlight valuable features and how to unlock them.
 - Provide side-by-side comparisons to showcase premium features vs. free-tier limitations

Behavioral-Based Drip Campaigns:

- **Personalized Drip Email Sequences:**
 - Build sequences that provide helpful content, product tips, and feature highlights.
 - Trigger emails based on specific actions (e.g., “You haven’t completed X. Here’s how to do it.”).
 - Showcase **case studies, testimonials, and use cases** to enhance credibility.
- **User Retargeting & Re-Engagement:**
 - Retarget users who show high intent but haven’t converted (e.g., those who visited pricing pages).
 - Use dynamic retargeting ads on LinkedIn, Google Ads, Facebook, and Twitter.
 - Run reminder campaigns before the trial expiration date to boost urgency.
- **Conversational Bumpers:**
 - Implement chatbots to provide real-time assistance during the trial.
 - Use conversational marketing tools like **Intercom, Drift, or LiveChat** to answer common questions.
 - Offer direct communication channels for enterprise users (personalized onboarding calls).

Cohort Analysis & Testing:

- **Monitor In-App User Behavior:**
 - Track key actions that indicate high engagement (e.g., feature usage, integration setup, team invites).

- Identify common pathways users take during the trial.
 - Use tools like **Mixpanel, Amplitude, and Heap** to identify patterns.
 - Monitor metrics like time-to-value, session frequency, and feature engagement.
 - **Compare Conversion Rates:**
 - Segment users by traffic source, user role, company size, and engagement type.
 - Compare cohorts (e.g., users who upgraded vs. those who didn't) to identify gaps.
 - Test different messaging frameworks for different segments (e.g., power users vs. casual users).
 - **Automated Lead Scoring:**
 - Use predictive models to identify the most promising leads.
 - Score users based on engagement metrics, feature adoption, and interaction frequency.
 - Implement follow-up workflows for high-potential users.
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Trial Conversion Optimization:

- **Optimize Conversion Paths:**
 - Remove unnecessary and overwhelming steps from the upgrade process.
 - Provide clear instructions for users to upgrade (visual cues, CTA buttons, tooltips).
 - Display ROI-based messaging to communicate product value effectively.
 - Provide visual cues and easy-to-follow instructions to complete payments.
 - Display testimonials and case studies during the checkout process.
 - **Dynamic Personalization:**
 - Tailor CTAs and messages based on user activity.
 - Adjust messaging based on user progress (e.g., "Complete Setup To Unlock Advanced Features").
 - Provide users with personalized dashboards showing progress and potential benefits.
 - **Product-Led Growth (PLG) Loops:**
 - Encourage users to invite colleagues or team members to increase virality.
 - Provide referral incentives (e.g., additional free usage, feature unlocks).
 - Utilize feedback loops to improve onboarding processes based on real-time feedback.
 - Implement sharing features and social proof mechanisms.
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Checklist Summary:

- [] Build segmented drip campaigns triggered by user actions.
- [] Implement strategic offers, such as feature unlocks and time-limited discounts.

- [] Set up conversational marketing tools to assist free trial users.
 - [] Track user behavior through in-app analytics and cohort analysis.
 - [] Test and optimize conversion flows (pricing pages, messaging, user journeys).
 - [] Build referral programs to enhance virality and product adoption.
 - [] Continuously refine messaging and offers based on performance data.
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Roles & Responsibilities:

- **CRO Specialist:**
 - Design and optimize free trial conversion flows.
 - Monitor analytics and implement high-converting CTAs.
- **Email Marketing Specialist:**
 - Build and optimize drip email sequences.
 - Personalize communication based on user behavior.
- **Product Manager:**
 - Enhance trial experience through improved onboarding flows.
 - Implement PLG loops to boost engagement and adoption.
- **Growth Marketer:**
 - Develop retargeting campaigns and nurture high-potential users.
 - Create referral and incentive programs.

Stage 5: Paid Customer (Retention & Optimization)

Goal: Maximize customer retention, increase lifetime value (LTV), and continuously improve the customer experience for sustainable revenue growth.

Tips & Best Practices:

Implement Robust Analytics System

Tools: ChartMogul, Baremetrics, ProfitWell, Mixpanel, Amplitude, Metabase, Tableau, Power BI.

- **Build Comprehensive Dashboards:**
 - Utilize tools like Tableau, Power BI, Google Data Studio, or Metabase to visualize essential metrics.
 - Set up live dashboards tracking real-time performance on metrics like MRR, ARR, Churn Rate, LTV, CAC, Activation Rates, and User Retention.
 - Segment data by user type (PQLs, MQLs, Paid Users) and acquisition channel to identify profitable paths.

- **Use Subscription Analysis Tools:**
 - Implement SaaS-specific platforms such as **ChartMogul, Baremetrics, ProfitWell, and Stripe Analytics** for revenue tracking and subscription analysis.
 - Monitor KPIs like **Expansion Revenue, Net Revenue Retention (NRR), and Monthly Revenue Churn**.
 - Set automated alerts for significant changes in revenue trends (e.g., sudden drops in MRR, unusual spikes in churn).
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Measure What Matters The Most:

- **CAC & LTV Metrics:**
 - Regularly measure **CAC (Customer Acquisition Cost)** and **LTV (Lifetime Value)** ratios.
 - Calculate CAC by channel and campaign to identify the most profitable acquisition sources.
 - Monitor CAC payback periods to optimize cash flow and marketing budgets.
 - **Sales Metrics & Pipeline Management:**
 - Track **Pipeline Generated Value Trends** (lead-to-MQL, MQL-to-PQL, PQL-to-Customer conversion rates).
 - Monitor **Sales Qualified Leads (SQLs)** and understand which channels generate the highest-quality leads.
 - Implement CRM tools (HubSpot, Salesforce, Pipedrive) to monitor pipeline stages and improve lead-to-customer conversion rates.
 - **Marketing Channel Analysis:**
 - Regularly identify and prioritize the marketing channels with the most positive CAC and highest LTV.
 - Continuously refine marketing messages based on what resonates with the most valuable customer segments.
 - Track funnel performance and identify drop-off points across channels.
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Build A Customer-Centric Approach:

- **Customer Feedback Loops:**
 - Implement post-purchase surveys, NPS surveys, and ongoing satisfaction assessments.
 - Use platforms like Typeform, SurveyMonkey, or Intercom to collect feedback.
 - Continuously iterate and improve product features based on user feedback.
- **Customer Education & Enablement:**
 - Organize **educational webinars and training sessions** to help customers maximize the value of your product.

- Create **resource libraries** with guides, case studies, and help articles that users can easily access.
 - Implement live chat support and conversational bumpers for real-time assistance.
 - **Upsell & Expansion Revenue Strategies:**
 - Identify opportunities for cross-selling and upselling based on user behavior.
 - Use drip campaigns, in-app messages, and sales outreach to promote premium features.
 - Implement dynamic pricing models that adjust based on user growth, usage, or value delivered.
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Retention & Churn Reduction:

- **User Segmentation:**
 - Group users by industry, role, usage patterns, and feature adoption.
 - Build retention strategies for high-value segments and monitor progress over time.
 - **Churn Analysis:**
 - Conduct exit interviews and cancellation surveys to identify common reasons for churn.
 - Monitor early warning signals (e.g., reduced engagement, account downgrades).
 - Provide proactive support to prevent churn and address user concerns promptly.
 - **Subscription Management & Renewals:**
 - Automate renewal processes and reminders for annual plans.
 - Test different renewal messaging to improve retention rates.
 - Use predictive models to identify customers at risk of churning.
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Checklist Summary:

- **[] Implement Analytics Systems:**
 - Setup live dashboards for essential metrics (MRR, ARR, Churn, LTV, CAC).
 - Utilize subscription analysis tools (ChartMogul, Baremetrics, ProfitWell).
 - Create automated alerts for significant metric changes.
- **[] Track Business-Critical Metrics:**
 - Measure CAC and LTV by channel, campaign, and customer segment.
 - Monitor pipeline conversion rates and overall sales efficiency.
 - Identify profitable marketing channels and continuously optimize.
- **[] Build Customer-Centric Processes:**
 - Run regular surveys and feedback loops.
 - Host webinars, training sessions, and customer education initiatives.
 - Implement upsell and cross-sell strategies with personalized messaging.
- **[] Retention & Churn Management:**

- Segment users by value, usage, and industry.
 - Monitor early warning signals for churn.
 - Automate subscription renewals and predict churn risks.
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Roles & Responsibilities:

- **Business Development:**
 - Monitor business metrics to inform the company about strategic movements.
 - Collaborate with the marketing and sales teams to optimize revenue generation.
- **Data Analyst:**
 - Build custom dashboards to track KPIs and customer segmentation.
 - Analyze revenue trends, churn rates, and cohort performance.
- **Customer Success Manager:**
 - Enhance retention strategies through proactive support and user education.
 - Collaborate with product teams to ensure customer needs are met.
- **Marketing Team:**
 - Implement ongoing optimization strategies for the best-performing channels.
 - Create personalized upsell campaigns and nurturing workflows.
- **Sales Team:**
 - Monitor and optimize sales pipeline metrics.
 - Improve SQL conversion rates through targeted outreach and lead management.