TRACTION FIRST

FIELD MANUAL

FROM STALLED TO SCALING. HOW TO FIX SALES AND BUILD REAL TRACTION.

JOSH BARKER

TRACTION
FIRST FIELD MANUAL

From Stalled to Scaling: How to Fix Sales and Build Real Traction

By Josh Barker

CONTENTS

I

INTRODUCTION

1. From Innovation to Traction

If you're reading this manual, chances are you've already read *Traction First*. If not, put this down and finish reading it! The book is the foundation — it resets how we think about growth. Too many teams build first and ask questions later. They sink time, money, and talent into the wrong things, then wonder why adoption never comes. *Traction First* gave you the mindset and the framework to flip that: seek traction first, build later. Prove traction before you double down.

This manual is the companion — the operator's guide.

Because here's the reality: the most common way a lack of "traction first" shows up isn't in product failure. It shows up in sales failure.

The question I've been asked a lot is: What happens if I've already built something? Maybe it's brand new. Maybe you've pivoted. Or maybe the market shifted and you're trying to catch up. And sales just aren't coming. Deals stall. Growth flatlines. Marketing generates activity, but nothing moves the needle. You keep pushing, but traction never shows up in the numbers.

Most leaders assume the issue is people: *"I need better sales reps."* Sometimes that's true. But more often, it's not the reps. It's the fit — the offer, the message, the market. Something's out of alignment.

That's the hardest part to admit. Words like "market validation" or "market experimentation" feel scary. They sound like going back to the beginning. Or you tell yourself you've already done them. But if customers aren't buying, the market is telling you something: validation isn't finished yet.

If this stings a little, you're not alone. CEOs everywhere hit this wall. You've poured time, money, and belief into what you're building. When the market doesn't respond, it doesn't just feel like a business problem — it feels personal. That's normal. And you're not failing. You're just in the gap between building something good and building something the market wants to buy.

That's why this Field Manual exists. The book gave you the mindset. This manual gives you the plays. Not theory, not fluff — but practical tools, checklists, and next steps you can run with your team when traction isn't showing up.

2. A New Approach: Traction-Based Marketing (TBM)

Most companies treat growth as someone else's job:

- **Product firms** build what gets made.
- **Marketing firms** promote what gets made.
- **Sales firms** push harder to close.
- **Innovation firms** imagine what's next.

The problem? None of these alone are designed to build traction.

Traction-Based Marketing (TBM) is different.

It's not just marketing. It's not just sales. It's not just product or innovation. It's the system that ties them together around one question:

> *Are we actually creating traction?*

TBM is built around three simple but powerful ideas:

1. **The Traction Engine Wheel**
   Growth isn't linear — it's a loop: Attract → Convert → Expand. Each step feeds the next. TBM makes sure all three legs of the stool are in motion.

2. **The Lean Canvas + Market Traction Funnel**
   Instead of endless decks, we use a living model (Lean Canvas) and a funnel process (MTF) to test whether the offer, the message, and the market are aligned.

3. **Pirate Metrics (AAARRR)**
   We don't measure activity. We measure signals:

Awareness, Acquisition, Activation, Revenue, Retention, Referral. These tell us if growth is compounding — or stalling.

With TBM, we don't just build, promote, or close in isolation.

We install a **traction engine** — a repeatable, testable, team-owned system that connects product, marketing, and sales around growth that actually sticks.

That's why we're different. Others optimize for activity. We optimize for traction.

3. How This Manual is Structured

The Field Manual is designed so you can jump to what you need, when you need it.

Part II – Building a Traction Engine

We start with the system itself. You'll see the **Traction Engine Wheel** — how all the pieces fit together. Then we break it down:

- The **Mindset** (Traction First) — why everything starts with how you think.
- The **Work** (Lean Canvas) — the model that keeps everyone aligned.
- The **Process** (Market Traction Funnel) — how we move from model → learnings → real solutions.
- The **Metrics** (Pirate Metrics AAARRR) — how you know if it's working.
- The **Team** (3 Legs of the Stool) — Attraction,

Conversion, and Expansion working together as a system.

If the book gave you the *why*, this is the *how*.

Part III – Situational Playbooks

Next, we get practical. Every team sees themselves in one of these scenarios:

- Stalled or Plateaued Growth
- New Venture Launch
- Innovation Programs
- AI & Tech Initiatives
- Strategic Shifts
- Diversification & DBU Plays
- Market Expansion
- M&A / Rollouts
- Brand / Messaging
- Venture Support
- Pilot-to-Scale
- Go-to-Market Launch

Each playbook starts with a diagnostic: *"Signs You're Here."* Then it shows you the core problem and the plays to get you unstuck. Think of it as a troubleshooting guide.

Part IV – Building Your Traction Engine

Finally, we zoom out. You'll get the **first 90 days** for building your engine, plus examples of **Traction Labs in practice.** This is your template for turning the manual into motion — inside your team, starting now.

4. Why This Matters

The book gave you the mindset shift: *traction before perfection.*

This manual meets you where you are now: stalled, launching, pivoting, or expanding. The problem isn't that you don't have smart people or bold ideas. The problem is that traction isn't showing up — yet.

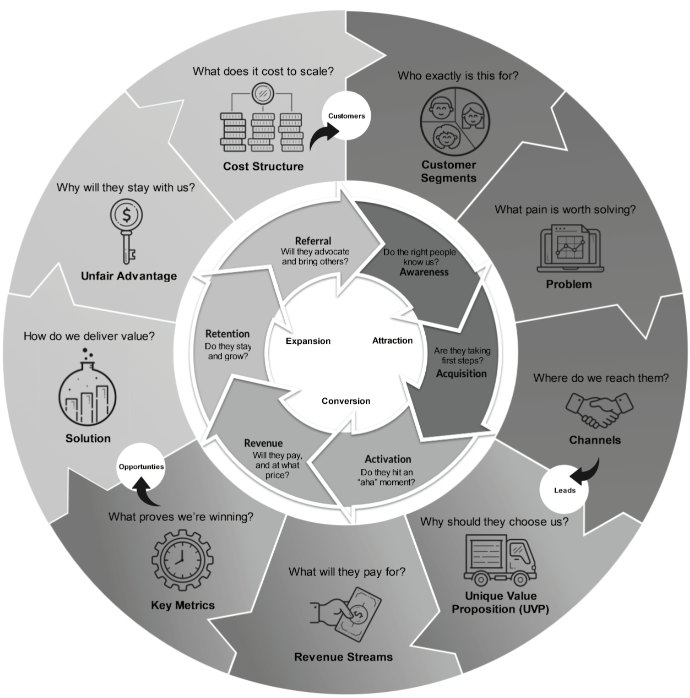
That's not a reason to panic. It's a reason to get focused.

Traction isn't luck. It's built.

And this is how.

II

BUILDING A TRACTION ENGINE



Traction Labs' Traction Engine Wheel

1. The Engine: Traction Engine Wheel

When most teams think about growth, they picture a straight line: awareness leads to interest, which leads to sales, which hopefully leads to happy customers. In reality, growth doesn't move in a straight line. It's a loop.

The **Traction Engine Wheel** is the high-level view of how traction really works. Customers don't just travel through a funnel and disappear — they loop back, fuel referrals, and drive the next cycle. Each stage feeds the next:

- **Attraction** — bringing the right opportunities into the conversation.
- **Conversion** — proving the promise, closing the deal, and turning interest into revenue.
- **Expansion** — delivering value, keeping customers, and turning them into advocates.

When all three legs of the wheel are working together, momentum compounds. Attraction fills the pipeline. Conversion creates customers. Expansion turns those customers into promoters, who fuel the next cycle of attraction.

That's why we call it a **wheel, not a funnel**. A funnel describes activity. A wheel describes energy and motion. The engine only works if all parts are connected and balanced.

This chapter gives you the overview. In the sections that follow, we'll dive into each spoke of the wheel:

- The **culture & mindset** that drives it (Traction First).
- The **work** that keeps it aligned (Lean Canvas).

- The **process** that keeps it disciplined (Market Traction Funnel).
- The **metrics** that show if it's working (Pirate Metrics).
- The **team roles** that keep it moving (Attraction, Conversion, Expansion).

The Wheel is the big picture. Everything else in this manual is about how to build it, run it, and keep it spinning.

2. The Culture & Mindset: Traction First

The *Traction First* book is all about mindset. It exists because most teams get this wrong. They build first, hope the market will show up, and only later realize they've been running with unproven assumptions. The book flips that script: traction over perfection, validation before scale, proof before product.

But mindset isn't a one-time lesson. It's the culture that powers the engine. If the culture is wrong, the system won't matter.

Most organizations default to a **"build-first" culture.** They believe the product will sell itself if it's good enough. They polish roadmaps, chase features, and burn cash on campaigns — all without real evidence that customers are ready to buy. That's why so many end up with strong products but flat sales.

The *Traction First* mindset flips that script:

- **Everything is a test.** Ads, outbound, demos, onboarding — they're experiments, not finished goods.

- **Traction beats perfection.** A scrappy solution that customers pay for is better than a polished product nobody wants.
- **Evidence over ego.** We follow signals from the market, even when they challenge our assumptions.
- **Sell before you scale.** If it won't sell small, it won't sell big.

The Trap of Success

Here's the paradox: when companies achieve success, they often lose the *Traction First* mindset. Instead of continuing to explore and experiment, they shift into **protection mode** — systematizing, standardizing, and trying to make everything perfect.

And here's the thing: **protection isn't bad.** In fact, it's necessary. Once you've found traction, you do need to protect it. You need guardrails, repeatable processes, and people who can scale what works without breaking it. That's how great businesses sustain.

But protection mode is a **different game** — and it requires a **different kind of person.**

- Protection mode is about **stability.** Keeping promises, delivering consistently, scaling operations, and preventing mistakes.
- Traction mode is about **discovery.** Testing, probing, experimenting, and embracing mistakes as part of learning.

Both are essential. But the trap is expecting the same team or culture to excel at both simultaneously. The people who are brilliant at protecting aren't usually the ones wired to explore. And the explorers who thrive in ambiguity often hate the guardrails of protection.

When companies don't recognize this, they either:

1. **Over-protect too soon** — scaling and systematizing before traction exists.
2. **Over-explore too long** — chasing new ideas without ever locking down what's working.

The art is knowing when to explore and when to protect — and making sure you've got the right people in place for each.

That's why *Traction First* matters: it keeps exploration alive until the evidence says it's time to protect.

Learning vs. Scaling

A *Traction First* culture knows the difference between learning and scaling.

- In the learning phase, we move **quick and fast**. We test ideas in days or weeks, not quarters. We place **small bets first**, knowing some will be wrong, so we can double down on the ones that are right.
- In the scaling phase, we invest bigger — but only after we have evidence that traction exists.

The mistake most teams make? They try to **scale before they've learned.** They systematize too early, polish too soon, and burn resources chasing unproven assumptions.

Experimentation Culture

A *Traction First* culture is built on experimentation. That means:

- We're **not afraid to be wrong.** Every failed test gets us closer to what works.
- We encourage people to explore, not just execute.
- Failure isn't punished; it's reframed as **fast, cheap learning.**
- The team celebrates insights as much as wins.

When this culture takes hold, something shifts:

- Teams stop hiding behind activity metrics and start chasing traction metrics.
- Leaders stop rewarding output ("we launched the feature") and start rewarding outcomes ("we closed the customer").
- People stop fearing the word "validation" and start seeing it as progress.

The truth is, most stalls in growth aren't because teams lack effort or talent. They stall because the culture slides into perfection and protection instead of staying in traction and exploration.

A *Traction First* culture expects proof. It expects learning. It expects small bets that grow into big wins. And it expects traction to show up in the form of sales, renewals, and referrals — not just ideas, prototypes, or campaigns.

This mindset is the fuel that keeps the wheel spinning. Without it, the engine will always run out of gas.

3. The Work: Lean Canvas

The *Traction First* book breaks down the Lean Canvas in detail — each quadrant, each question. By now, you already know it's the fastest way to turn big ideas into a testable model.

But here in the Field Manual, we're looking at it differently: the Lean Canvas is not just a model. It's the **work map of the traction engine.**

If the **Traction Engine Wheel** shows how growth loops, the Lean Canvas shows **who owns which parts of that loop**. It divides the work across the three legs of the stool — Attraction, Conversion, and Expansion — so no block is left hanging, and no two teams fight over the same job.

How the Canvas Connects to the Wheel

- **Attraction:**
  Owns *Customer Segments, Problem, and Channels.* Their job is to identify the right people, clarify the pains worth solving, and figure out where to reach them.

- **Conversion:**
  Owns *Unique Value Proposition, Revenue Streams, and Key Metrics.* Their job is to prove the promise in real conversations, design revenue models customers will pay for, and track whether deals are moving.

- **Expansion:**
  Owns *Solution, Unfair Advantage, and Cost Structure.*

Their job is to deliver value, keep customers, and build stickiness and defensibility into the system while making sure the economics scale.

Why This Matters

Most teams use the Lean Canvas as a **static document**. We use it as an **operating system.** Each block represents a "job to figure out" inside the traction engine. Together, they create accountability:

- No overlaps (two teams owning the same thing).
- No gaps (critical questions ignored).
- A clear map of how the outside of the wheel (customers, problems, value) connects to the inside of the wheel (activation, revenue, retention).

This is how we keep the engine honest. The Lean Canvas makes sure every piece of work connects back to traction, and every part of the wheel has an owner.

4. The Metrics: B2B Pirate Metrics (AAARRR)

The Traction Engine needs a scoreboard. Without one, teams default to vanity numbers: impressions, clicks, activities, and pipeline “noise” that don’t prove real traction.

That’s why we use **Pirate Metrics (AAARRR)** — a simple framework that tracks the six signals that actually show if traction is happening.

Why AAARRR, Not Activity

Every funnel, campaign, or initiative should ladder back to one of these:

- **Awareness** → Do the right people know we exist?
- **Acquisition** → Are they taking first steps with us?
- **Activation** → Do they hit an “aha” moment in the early experience?
- **Revenue** → Will they pay, and at what price?
- **Retention** → Do they stay and grow?
- **Referral** → Will they advocate and bring others?

Notice something: in B2B, we flip **Revenue** and **Retention** compared to the traditional consumer model. Why? Because in enterprise sales, the revenue decision (a contract, PO, or pilot approval) often comes before true retention is proven. Payment happens up front, but the stickiness of adoption lags.

That sequencing matters. It forces us to measure not just “closed won” but whether customers **actually stay, use, and expand.**

How Pirate Metrics Map to the Wheel

- **Attraction → Awareness & Acquisition**
  Marketing is successful when the right ICPs know us and take first steps (clicks, sign-ups, meetings booked).

- **Conversion → Activation & Revenue**
  Sales is successful when prospects hit an "aha" in discovery or demos — and then actually pay.

- **Expansion → Retention & Referral**
  Customer Success is successful when customers stay, grow, and become advocates who fuel the next cycle of attraction.

The Power of Shared Metrics

The magic of Pirate Metrics isn't the labels. It's the **shared language.**

- Marketing, Sales, and Success all report against the same six outcomes.
- Leaders stop fighting over attribution and start focusing on progression.
- The team can see clearly where the wheel is stalling — Awareness? Activation? Retention? — and fix the right bottleneck.

When a company says they "don't know why growth is stuck," it's usually because they aren't measuring with Pirate Metrics. They're drowning in activity data instead of watching the real traction signals.

Pirate Metrics are the odometer for the engine. They don't just show how fast you're moving — they reveal where energy is leaking, and where the next push needs to go.

5. The Team: 3 Legs of the Stool (TBM)

A traction engine doesn't run on ideas alone. It runs on people. And not just any people — the right people doing the right jobs at the right stage of the wheel. That's why we think of the team as a **three-legged stool**: Attraction, Conversion, and Expansion.

If one leg is missing, the stool tips. If one leg grows while the others lag, the engine wobbles. But when all three are balanced and strong, the stool holds and traction compounds.

This is what makes *Traction-Based Marketing (TBM)* different from traditional org charts. Most companies wall off marketing, sales, and customer success into silos with different metrics, agendas, and playbooks. TBM ties them together as one **traction team**, aligned by a shared mindset, shared tools, and shared scoreboards.

Shared Mindset Training (for all 3 legs)

Before roles and responsibilities, the entire traction team trains on the same foundations:

- **Experiment Mindset** → Everything is a test: ads, outbound, demos, onboarding.
- **Traction-Based Marketing Orientation** → Why Attract / Convert / Expand matter, and how Leads

→ Revenue → Referrals loops actually power the engine.

- **Market Traction Funnel (MTF)** → Model → Learn → Solution. Where each stool fits.
- **Lean Canvas** → The 9 blocks, and who owns what:
  - Attraction = *Problem, Segments, Channels*
  - Conversion = *UVP, Revenue, Key Metrics*
  - Expansion = *Solution, Cost, Unfair Advantage*
- **Pirate Metrics** → Awareness through Referral, and how team outputs map (Leads, Revenue, Retention, Referrals).
- **Customer Discovery & PMF** → Shared methods for interviews, validating pain, and proving traction exists.

This training makes sure everyone speaks the same language — no silos, no misalignment.

i. Attraction: A New Type of Marketing

Traditional marketing is about pushing messages. TBM Attraction is about creating awareness and pulling the right people into first steps.

Responsibilities

- Define ICPs & target accounts.
- Conduct market research & trend scanning.
- Build prospecting lists & manage tools (Apollo, Dripify, LinkedIn).
- Run awareness campaigns (ads, events, content, nurture).

- Test messaging & positioning across channels.
- Generate and qualify inbound/outbound leads.
- Maintain CRM hygiene for early-stage opportunities.

Training

- ICP creation & targeting workshops.
- Channel testing (ads, events, automation).
- Messaging experiments built from customer pain statements.
- CRM lead flow & qualification processes.

Metrics

- MQLs, CPL, conversion rate to meetings.

Likely Previous Roles

- Marketing-related roles: Demand Gen, Growth Marketer, Marketing Ops.

Mindset Shift

From *"make noise"* to **"find proof."** Marketing isn't about volume — it's about validating pain exists and the right people are responding.

ii. Conversion: A New Type of Sales

Traditional sales pushes harder: more calls, more demos, more pressure. TBM Conversion is about proving fit and capturing real learning from every interaction.

Responsibilities

- Respond to GTM-generated leads.

- Run agile conversations to test value prop, positioning, and language.
- Conduct discovery calls & qualification.
- Deliver demos & ROI conversations.
- Craft proposals, pricing, and deal structures.
- Negotiate terms & contracts.
- Manage pipeline & forecast revenue.
- Hand off proposals or pilots when scaffolding is needed.

Training

- Discovery call frameworks (*Mom Test, Jobs-to-be-Done*).
- UVP + ROI storytelling in proposals.
- Demo design & objection handling.
- Pipeline management & forecasting.

Metrics

- Meetings → Proposals → Closed Won.
- Win Rate, CAC.

Likely Previous Roles

- Sales-related roles like: SDR, AE, BDR.

Mindset Shift

From *"always be closing"* to **"always be learning."** Every demo, every lost deal, every objection is market data that feeds the engine.

iii. Expansion: A New Type of Customer Success

Traditional CS is reactive — keep customers happy, reduce churn. TBM Expansion is proactive — proving value, building loyalty, and fueling referrals.

Responsibilities

- Support proposals with assets, prototypes, pilots, or “wizard-of-oz” scaffolding.
- Deliver the product/service to new customers.
- Enhance customer/user experience.
- Onboard customers (beta groups, trials, training, setup, success plans).
- Track retention metrics (usage, adoption, renewals).
- Drive advocacy (case studies, referrals, testimonials).
- Strengthen unfair advantage (stickiness, differentiation, switching costs).
- Surface insights back to GTM (new pains, gaps, signals).

Training

- Wizard-of-Oz & prototype delivery (no-code hacks, service design).
- Onboarding playbooks & success plans.
- Renewal & expansion strategies.
- Referral engine design (asks, testimonials, case studies).

Metrics

- Retention %, Expansion $, Referrals/NPS.

Likely Previous Roles

- Customer-success related roles: Implementation Specialist, Product Manager, CX/UX Designer, Customer Success Manager, Engagement Manager.

Mindset Shift

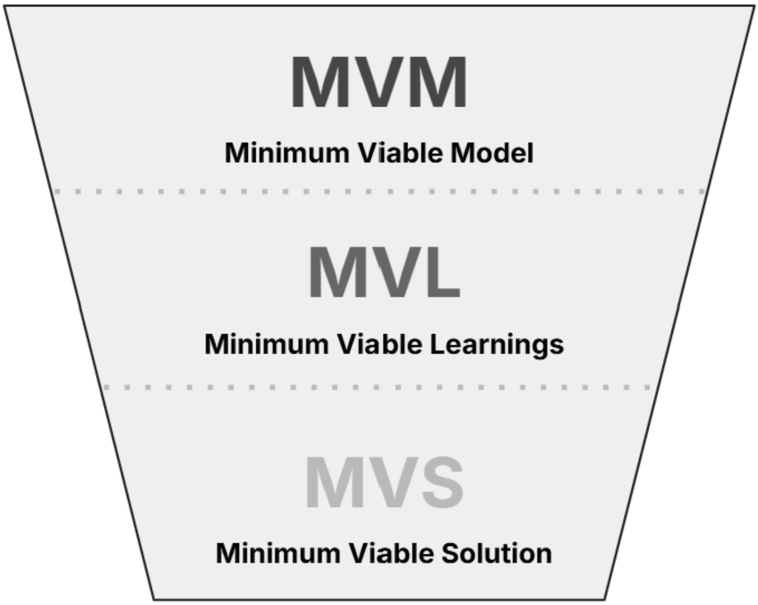
From *"keep customers happy"* to **"turn customers into traction."** Retention is not the end goal — expansion and advocacy are.

Why This Matters

Attraction, Conversion, and Expansion are not three silos. They're three legs of one stool. Held together by:

- A **shared mindset** (Traction First).
- A **shared map** (Lean Canvas).
- A **shared process** (MTF).
- A **shared scoreboard** (Pirate Metrics).

That's what makes the stool hold. That's what keeps the wheel spinning.



6. The Process: Market Traction Funnel (MTF)

The *Traction First* book goes deep into the Market Traction Funnel (MTF). Here in the Field Manual, our focus is connecting it back to the **engine and the team.**

At its core, the MTF is the discipline of moving from:

- **MVM (Minimum Viable Model)** → sketching the first draft of the business model.
- **MVL (Minimum Viable Learnings)** → systematically testing assumptions with real experiments.
- **MVS (Minimum Viable Solution)** → doubling down on what works, scaling only after traction is proven.

How the Engine Works the Funnel

All three legs of the traction team — Attraction, Conversion, and Expansion — collaborate through the funnel.

1. **Assembling the MVM**
    - Together, the team builds the *first draft of the model* using the Lean Canvas.
    - Attraction maps out *segments, problems, and channels*.
    - Conversion defines early *UVPs, revenue tests, and key metrics*.
    - Expansion outlines *solution scaffolding, cost, and unfair advantage*.
2. **Running MVL (Systematic Testing)**
    - Each block of the Canvas gets tested with fast, cheap experiments.
    - Attraction tests whether the problem resonates and whether channels pull.
    - Conversion tests whether messaging lands, whether demos hit the "aha," and whether prospects pay.
    - Expansion tests onboarding, usage, renewals, and whether customers stick.
3. Every test is a learning loop. The question is always: *Does this piece of the model hold up in reality?*
4. **Locking in the MVS**
    - Once enough validation is gathered, the team moves from testing to delivery.

- The solution becomes more repeatable, customer success playbooks get formalized, and growth starts to scale.

MTF in the Engine

- **The Wheel (Attract → Convert → Expand)** shows the motion of growth.
- **The Lean Canvas** shows the work map and ownership.
- **The Pirate Metrics** show the scoreboard.
- **The Market Traction Funnel** is the process that keeps the engine disciplined — ensuring the team validates each piece before adding fuel.

Why this Discipline Matters

Most stalls happen when companies try to **scale before they've learned.**

- Marketing tries to pump more leads before the message is validated.
- Sales tries to close big deals before the UVP is proven.
- Product/Success tries to perfect onboarding before knowing what customers really value.

The Market Traction Funnel forces the team to stay honest:

- Don't protect too soon.
- Don't over-invest without evidence.
- Validate each block before scaling it.

That's the process. But here's the reality: no two companies get stuck in the same place. Some stall at awareness. Some at revenue. Others at expansion. The funnel is universal, but the *situations* are unique.

That’s where the **Situational Playbooks** come in.

III

SITUATIONAL PLAYBOOKS

Think of this section as a troubleshooting guide for traction. Each playbook starts with the symptoms (*"Signs You're Here"*), explains why it matters, and then shows the plays to get unstuck.

These aren't hypotheticals. They're the real moments where leaders feel traction slipping:

- Sales activity without conversions.
- New ventures struggling to find early adopters.
- Pilots that never scale.
- Growth flatlining even after years of investment.

Wherever you're stuck, you'll see yourself in one of these playbooks. And when you do, you'll have a clear next step.

1. Playbook 1: Stalled or Plateaued Growth

Signs You're Here

- **Sales activity without conversions** → The team is busy with calls, demos, and proposals, but few deals are closing. Energy is high, outcomes are flat.

- **Marketing producing leads that don't move forward** → Campaigns are generating interest, but prospects stall out before serious engagement. Leads look good on paper but don't translate into revenue.
- **Pipeline full of pilots but no scale** → Customers agree to test, but pilots never expand. Proof-of-concepts drag on, and deals die before they become meaningful.
- **Channel fatigue** → One channel (events, ads, outbound, partnerships) carried growth for a while, but it's now saturated. New channels aren't delivering the same momentum.
- **Customer churn offsetting new growth** → New logos come in, but retention lags. Gains are erased as fast as they're added.
- **CAC rising faster than LTV** → The cost of acquiring customers is climbing, while customer lifetime value is flat or declining. Growth is literally getting more expensive than it's worth.
- **Growth slowing despite new features or campaigns** → You've launched new initiatives, but they haven't moved the needle. The market isn't responding to added effort.

Why It Matters

A plateau can feel deceptive. On the surface, things look active — meetings, pilots, new features, fresh campaigns. But beneath it, the engine has lost momentum. Without momentum, even small headwinds (competition, budget cuts, customer hesitation) can stall growth completely.

The danger is how most teams react: by pushing harder on the wrong things.

- Marketing spends more budget driving the same unvalidated message.
- Sales pushes bigger deals with the same unproven UVP.
- Product invests in features without clear evidence customers will care.

All that effort only accelerates the stall. The real issue is usually **fit, not effort.** Somewhere in the funnel, a key assumption hasn't been validated — and until it is, scaling only makes the stall worse.

Playbook Focus

The way out of a plateau isn't more activity. It's diagnosis and focus.

- **Revisit the Lean Canvas** → Highlight the riskiest blocks. Where's the weakest link: problem, segment, UVP, channel, or retention?
- **Map Pirate Metrics (AAARRR)** → Pinpoint the stage where customers are dropping out: awareness, acquisition, activation, revenue, retention, or referral.
- **Run MVL Experiments** → Design small, fast tests to validate or kill assumptions before pouring more resources into them.
- **Reset Growth Channels** → Don't keep squeezing a maxed-out channel. Experiment with 2–3 new ones until you find the next source of momentum.
- **Refocus on Retention Signals** → Growth isn't real

if customers don't stay. Prove stickiness before chasing new logos.

The goal isn't to scale harder — it's to **get the wheel spinning again.** By clearing the bottleneck in the funnel, momentum returns, and the path forward becomes clear.

2. Playbook 2: New Venture Launch

Signs You're Here

- **Founder-led sales hitting a ceiling** → Early traction came from the founder's network, hustle, and credibility. But now every new deal depends on their time, and growth stalls because it's not yet a repeatable system.
- **Entering a brand-new market with no precedent** → There are no benchmarks, no established buying behaviors, and customers don't yet know how to evaluate what you're offering. Every conversation feels like education from scratch.
- **Creating a new category where buyers don't "get it" yet** → Prospects don't have budget lines or mental models for what you're selling. You spend more time convincing them the problem exists than showing why your solution is best.
- **Corporate spinouts or incubators testing ideas outside the core** → The parent company has resources, but credibility and channels don't translate. The new venture has to prove traction in unfamiliar territory, without leaning too hard on the mothership.

- **Pressure from investors or funding to prove traction fast** → There's money on the table — or expectations for the next round — but without evidence of market demand, the clock is ticking.
- **Struggle to find "the first 100 customers"** → Every founder knows this milestone matters. Without a base of early adopters, it's nearly impossible to cross into mainstream adoption.

Why It Matters

The early stage of a venture is fragile. You've built enough to show promise, but not enough to prove scale. This is the **make-or-break window**: you either find repeatable traction signals or risk burning through cash and credibility before you do.

The danger is defaulting to the wrong levers:

- Hiring a sales team before the value prop is proven.
- Spending heavily on marketing before channels are validated.
- Scaling delivery before knowing what customers actually value.

In this stage, traction isn't about **growth at all costs** — it's about **proof at small scale.** If you can't prove it works with 10, 20, 50 customers, adding 1,000 more won't fix it.

Playbook Focus

The job of a new venture isn't to scale. It's to **learn fast and prove fit.**

- **Anchor in the Lean Canvas** → Use it as a living map. Identify riskiest assumptions first: problem, segment, UVP.
- **Run the Market Traction Funnel (MTF)** → Keep experiments small and fast. MVM → MVL → MVS. Don't jump to "solution" before validation.
- **Systematize Founder-Led Sales** → Capture what the founder does instinctively (language, objections, stories) and turn it into repeatable scripts and processes others can run.
- **Design for the First 100 Customers** → Optimize onboarding, messaging, and delivery for early adopters who will stick and tell the story to others.
- **Prove Before You Hire** → Add sales and marketing headcount only after the model and message are validated. Early hires should extend proof, not cover for lack of it.
- **Measure by Pirate Metrics** → Focus on Awareness, Acquisition, and Activation first. Revenue should be early signals, but retention and referral prove real traction.

The goal of this playbook isn't scaling up — it's proving that scaling *will work when the time comes.*

3. Playbook 3: Innovation Programs

Signs You're Here

- **R&D prototypes not gaining real adoption** → Teams produce impressive tech demos, but they never translate into actual products customers use.
- **Corporate labs struggling to deliver measurable ROI** → Budgets are spent, projects are showcased, but leaders can't point to revenue, traction, or strategic wins that justify the investment.
- **Executive mandates for innovation without traction** → Top-down directives demand "something innovative," but there's no evidence the ideas connect with customer needs or market demand.
- **"Innovation theatre"** → Endless brainstorming sessions, sticky notes, and hackathons — with little proof that any of it solves real problems or creates value.
- **Disconnect between innovation teams and core business units** → Labs operate in isolation, pursuing ideas the core business won't adopt or scale. Innovation feels like a side show instead of a growth driver.
- **Too many bets, no prioritization on which to scale** → The portfolio looks busy, but without clear criteria for which experiments to double down on, resources get spread too thin and traction never materializes.

Why It Matters

Corporate innovation is often judged by activity, not outcomes. The result: money spent, headlines earned, but little lasting impact. When labs fail to produce real traction, they lose credibility with executives and line-of-business leaders.

The danger isn't that innovation teams don't work hard — it's that they measure the wrong things. Activity is easy to show. Proof is harder. Without adoption and revenue signals, "innovation" becomes a cost center instead of a growth engine.

Even worse, disconnects between labs and the core business mean good ideas die on the vine. Innovation teams feel frustrated, core teams feel skeptical, and the company misses opportunities to learn and grow.

Playbook Focus

The job of innovation programs isn't to look creative — it's to produce validated bets the business can scale.

- **Anchor in Customer Discovery** → Every prototype must start with a validated problem and customer segment. No problem, no project.
- **Use the Market Traction Funnel (MTF)** → Run small, disciplined tests (MVM → MVL → MVS) before scaling investments. Don't skip straight to shiny prototypes.
- **Define Success by Traction Signals** → Shift metrics from activity (workshops, prototypes) to Pirate

Metrics (Activation, Revenue, Retention). Traction, not theatre.

- **Bridge to the Core** → Build collaboration between innovation teams and line-of-business leaders early. If the core won't adopt it, the idea isn't viable.
- **Prioritize Ruthlessly** → Out of ten bets, one or two may be worth scaling. Kill weak bets fast. Concentrate resources on the ones that prove fit.
- **Build Credibility Through Wins** → Small validated pilots that turn into core revenue earn more trust than flashy demos.

The goal of this playbook isn't to generate ideas. It's to generate **proof** — and to hand off only those ideas that the core business can scale.

4. Playbook 4: AI & Tech Initiatives

Signs You're Here

- **"Cool tech" that isn't selling** → The solution is technically impressive, but customers don't see an urgent problem it solves.
- **PowerPoint decks vs. progress** → Lots of slideware, roadmaps, and vision statements — but little evidence of traction in the market.
- **Pilots stuck in endless proof-of-concept stage** → Customers agree to test, but never expand. The pilot becomes a graveyard for resources instead of a launchpad for growth.
- **Industry or customer resistance to adoption** →

Prospects say, *"sounds interesting..."* but never commit. Fear, skepticism, or misalignment slows down deals.

- **Over-engineering vs. problem-solving** → Teams build sophisticated features because they can, not because customers demand them. Product evolves faster than adoption.
- **Struggle to move from lab demo → enterprise rollout** → The tech works in controlled environments, but hits integration, security, or compliance walls in production.
- **Competitors positioning AI better — even with weaker tech** → Others win deals with simpler solutions or clearer messaging, while stronger technology stalls.

Why It Matters

AI and emerging tech carry massive promise — but they're also riddled with hype. Teams often mistake technical innovation for market traction. The danger: by chasing features and demos without proof of adoption, they build in the wrong direction.

Enterprise buyers in particular are cautious. They want evidence of ROI, integration paths, and risk management before adoption. When initiatives stall in proof-of-concept purgatory, teams burn cash and credibility, while competitors position themselves as safer, clearer, or more aligned with customer pains.

In AI especially, speed matters. The market moves fast, but only those who connect the tech to urgent customer problems cut through the noise.

Playbook Focus

The job of AI and tech initiatives isn't to build more — it's to prove adoption.

- **Anchor in Urgent Problems** → Stop leading with the tech. Lead with the customer pain it solves right now. If urgency isn't there, adoption won't be either.
- **Design Proofs with Clear Next Steps** → Don't accept endless pilots. Every proof-of-concept should have a defined expansion path if results are hit.
- **Simplify the Story** → Customers buy clarity, not complexity. Translate the tech into outcomes in plain language.
- **Measure by Pirate Metrics** → Track Activation (aha moments), Revenue (paying customers), and Retention (do they stick). Tech demos mean nothing without these signals.
- **Balance Build vs. Solve** → Resist over-engineering. Every feature should trace back to validated customer needs.
- **Plan for Production Early** → Address integration, compliance, and rollout challenges upfront. Don't leave them as afterthoughts.
- **Out-Position Competitors** → Stronger tech doesn't win on its own. Stronger positioning does. Make adoption feel safe, valuable, and urgent.

The goal of this playbook isn't to show off what the tech *can* do. It's to prove customers will **adopt it, pay for it, and expand it.**

5. Playbook 5: Strategic Shifts

Signs You're Here

- **Market downturn forcing repositioning** → Recession, budget cuts, or external shocks suddenly make your current offer less attractive or unaffordable.
- **Competitors leapfrogging with stronger messaging or offers** → Rivals are winning deals not because their product is better, but because they've positioned themselves more clearly, simply, or urgently.
- **Core offer feels outdated or mismatched to demand** → What once sold easily now feels irrelevant, mismatched, or "yesterday's solution" in the eyes of the market.
- **New regulations disrupting GTM or pricing** → Compliance, privacy, or industry rules force changes that slow down sales, kill margins, or block entry into markets.
- **Pricing model no longer matches how buyers want to buy** → Customers want subscriptions, usage-based pricing, or flexible terms — while you're still offering a rigid, outdated model.
- **Leadership pushing for a pivot without clarity** → Executives sense a shift is needed but haven't defined the direction, leaving teams scattered, anxious, or spinning in circles.

Why It Matters

Markets move. Competitors adjust. Buyers evolve. The danger isn't change itself — it's **reacting the wrong way**:

- Some teams cling to the old playbook too long, burning credibility and revenue while the market passes them by.
- Others swing too far, pivoting wildly without validation, confusing both customers and employees.

Strategic shifts are make-or-break moments. A wrong move can derail momentum and morale. A right move can reframe the company, recapture demand, and open new growth paths.

The key is treating a shift as a **traction problem, not just a strategy problem.** It's not about brainstorming new ideas in the boardroom. It's about validating, with evidence, which new positioning, pricing, or market will actually create traction.

Playbook Focus

The job of a strategic shift is not to "guess better" — it's to **prove faster.**

- **Reframe the Canvas** → Update your Lean Canvas to reflect new market realities. Identify which blocks (problem, UVP, pricing) no longer hold and need validation.
- **Run Market Traction Funnel (MTF) Tests** → Treat repositioning as an experiment. Small-scale

campaigns, pricing pilots, or segment tests will show which direction creates traction before committing big resources.

- **Monitor Pirate Metrics Closely** → Use Awareness, Activation, and Revenue signals as early markers. Retention and Referral will prove the shift is sticking.
- **Simplify Messaging** → In a shifting market, clarity wins. Tighten your story around the new pain and why you solve it better than anyone else.
- **Align Leadership and Teams** → Make the pivot tangible. Give teams shared language and traction goals so execution is unified, not chaotic.
- **De-risk Pricing Changes** → Test new pricing models with subsets of customers before rolling out broadly. Let evidence guide the transition.

The goal of this playbook isn't to pivot for pivot's sake. It's to **realign with demand, backed by proof, so the engine keeps spinning in a new direction.**

6. Playbook 6: Diversification & DBU Plays

Signs You're Here

- **Core industry is down, need new outlets** → Demand in your primary sector (e.g., auto, energy, retail) has slumped, and leadership wants to apply existing tools, machines, or IP in other industries.
- **Finding adjacent markets with least retooling effort** → The hunt is on for industries where capabilities can

be reused without heavy reinvestment — but no clear evidence of demand yet.

- **Adjacency plays launched without demand signals** → New verticals are pursued based on theory or board pressure, but without validation that real buyers exist.
- **Redeploying expertise into a new vertical** → Manufacturing, software, or service know-how is solid — but translating it into another market requires different language, expectations, and sales motions.
- **Sales team still selling the old way** → Reps are comfortable pitching the legacy story, but that same playbook falls flat with new buyers. Misalignment slows traction.
- **Brand credibility not translating** → The brand carries weight in the core industry but feels irrelevant or unknown in the target vertical. Buyers don't yet trust the company's right to play there.

Why It Matters

Diversification is often a survival move when a core market slows. But rushing into adjacencies without traction signals is risky:

- Teams assume capabilities will translate, only to discover new buyers have very different pains.
- Sales keeps pitching old language, confusing or alienating new prospects.
- Leadership spreads resources across too many verticals, chasing breadth over depth.

The danger: instead of diversification unlocking growth, it creates **dilution.** Core momentum stalls further, and new bets don't stick.

Done right, though, diversification is powerful. Leveraging existing expertise into new markets can open new revenue streams, de-risk exposure to downturns, and unlock growth you couldn't reach in your original industry. The key is moving with discipline, not desperation.

Playbook Focus

The job of diversification is not just "launch more verticals" — it's to **validate adjacencies before scaling them.**

- **Rebuild the Lean Canvas per vertical** → Treat each new industry as a fresh model. Revalidate segments, problems, and UVPs — don't assume carryover from the core.
- **Run Market Traction Funnel (MTF) Experiments** → Small-scale tests in each adjacency (messaging, pilots, channel outreach) will reveal which markets pull and which ones don't.
- **Retrain the Sales Motion** → Equip reps with new ICPs, buyer pains, and ROI stories. Don't let legacy pitches undermine credibility in new markets.
- **Test Brand Translation** → Use early campaigns to see if your core brand resonates or if a sub-brand/ positioning shift is needed for credibility.
- **Prioritize Ruthlessly** → Not all adjacencies are equal. Double down only where early traction signals appear — kill or pause others.
- **Measure CAC vs. LTV by Vertical** → Prove that new

markets are profitable to enter, not just theoretically attractive.

The goal of this playbook isn't to diversify everywhere. It's to **find the few adjacencies where your expertise truly translates — and scale those with evidence, not hope.**

7. Playbook 7: Market Expansion

Signs You're Here

- **Regional success → national/global rollout challenges** → You've proven traction in one geography, but scaling beyond it reveals new complexities (logistics, pricing, regulations, distribution).
- **Entering new ICPs or verticals, unsure which to prioritize** → Early customers are diverse, and the team struggles to decide where to double down first.
- **Early traction in one segment, difficulty crossing to mainstream adoption** → Enthusiasts and innovators bought early, but mainstream buyers remain skeptical.
- **Cross-border issues** → International growth runs into compliance hurdles, cultural nuance, or localization needs you didn't face at home.
- **Channel/partner strategy missing** → Direct sales worked for the first wave, but scaling requires distributors, VARs, or ecosystem partners — none of which are in place.
- **Limited brand awareness outside core market** → In your home region or niche you're known, but in new markets you're just another unknown vendor.

Why It Matters

Expansion is where many companies stumble. What worked in a small, familiar market rarely translates directly to a bigger or different one. The danger: assuming momentum in one region, ICP, or vertical means you can copy-paste everywhere.

- Without adaptation, new markets stall.
- Without prioritization, resources spread thin across too many fronts.
- Without partners or localization, growth gets blocked by factors outside your control.

The risk is scaling *too fast, too wide* and burning resources, or *too slow, too narrow* and missing the window while competitors expand.

Playbook Focus

The job of market expansion is not just to "do more of the same" — it's to **adapt, prioritize, and prove scalability.**

- **Segment & Prioritize** → Use the Lean Canvas per ICP/vertical. Choose 1–2 to go deep in, rather than chasing them all.
- **Cross the Chasm** → Move from early adopters to mainstream buyers by simplifying the story, proving ROI, and building references that create trust.
- **Adapt Go-to-Market by Region** → Treat new countries/regions like fresh models. Validate compliance, local needs, and cultural nuances early.
- **Build Partner/Channel Strategy** → For scale, identify

which partners (resellers, integrators, distributors) accelerate entry and create credibility.

- **Invest in Awareness Beyond Core** → Targeted brand-building efforts in new markets, not generic global messaging, to seed credibility where you're unknown.
- **Measure Traction by Market** → Track Pirate Metrics at the market/vertical level — Awareness, Acquisition, Activation, Revenue, Retention, Referral — to see where adoption is real and where it lags.

The goal isn't just to go bigger. It's to **prove your engine scales across markets — with evidence, not assumption.**

8. Playbook 8: M&A / Rollouts

Signs You're Here

- **Customer confusion after acquisition or merger** → Existing customers don't know what the combined entity stands for, or worry about product overlap, support, and roadmap clarity.
- **Struggle to unify brands, messaging, and GTM motions** → Multiple logos, product names, and sales stories compete internally and externally. Messaging is fragmented, confusing prospects and slowing deals.
- **Sales and CS teams from merged entities working at odds** → Legacy teams stick to old playbooks, creating misaligned pitches, inconsistent onboarding, and cultural friction.
- **Systems integration slowing progress** → CRMs,

billing systems, or GTM tools don't connect, leaving data fragmented and handoffs messy.

- **Acquired product/brand not scaling in parent pipeline** → The original team sold it well, but the parent company can't replicate traction within its larger machine.
- **Rollout stalling across divisions or regions** → Adoption in one business unit or region works, but extending to others lags due to politics, priorities, or lack of enablement.

Why It Matters

Mergers and acquisitions are meant to accelerate growth — new markets, cross-sell opportunities, expanded capabilities. But more often, they create drag before they create lift.

The danger isn't the deal itself, it's the **post-deal execution.** If brands aren't unified, customers lose trust. If sales teams aren't aligned, revenue slows. If systems don't connect, the customer experience breaks. What should be a growth catalyst becomes a distraction.

Even worse, the acquired asset may never realize its potential. Without proper positioning and integration, the deal erodes value instead of multiplying it.

Playbook Focus

The job of post-M&A and rollout work isn't just integration — it's to **rebuild traction across the combined entity.**

- **Unify the Story** → Align messaging and brand architecture fast. Customers need a clear, simple answer to *“who are you now, and why is this better for me?”*

- **Align GTM Motions** → Train sales and CS teams on a unified playbook. Legacy motions must give way to one repeatable, scalable engine.
- **Prioritize Customer Communication** → Overcommunicate with customers about changes. Reduce uncertainty before it becomes churn.
- **Simplify Systems Integration** → Focus first on critical GTM tooling (CRM, billing, support systems). Don’t let messy handoffs derail traction.
- **Protect & Scale Wins** → Identify what made the acquired product succeed, and replicate it in the parent company’s pipeline without losing its magic.
- **Roll Out in Waves** → Don’t attempt global rollout overnight. Sequence divisions or regions, validate traction, and use learnings to scale the rest.

The goal isn’t to blend everything perfectly on day one. It’s to **rebuild momentum fast, create clarity for customers, and unlock the multiplier effect the deal promised.**

9. Playbook 9: Brand / Messaging

Signs You're Here

- **"Nobody understands what we do"** → Prospects struggle to explain your offer back to you. Confusion stalls deals before they start.
- **Confusing or fragmented positioning** → Different teams tell different stories. Marketing, sales, and success describe the company in ways that don't match.
- **Too feature-led** → Messaging focuses on what the product *does* instead of what pain it solves. The story reads like a spec sheet, not a solution.
- **Positioning drift** → Messaging that once resonated no longer fits market reality. The words sound dated or irrelevant to today's buyers.
- **Lack of differentiation** → Competitors sound the same. Your message blends into the noise instead of standing out.
- **Weak proof points** → Few case studies, testimonials, or customer voices back up the claims. Buyers don't see evidence that your solution works.

Why It Matters

Brand and messaging are not about logos or taglines — they're about **clarity and conviction.** If prospects don't quickly grasp what you do, who it's for, and why it matters, you've lost before the sale begins.

Confusion costs deals. Feature-speak buries the value. And without differentiation, customers default to the lowest price or the loudest competitor.

The danger is letting messaging drift quietly over time. What worked when you launched no longer resonates. Competitors reposition faster, leaving you sounding out of date. Internally, fragmented stories create friction between teams, making it harder to align on GTM.

Without clear, consistent messaging anchored in customer pain, even good products and capable teams fail to generate traction.

Playbook Focus

The job of brand and messaging is not to “sound better” — it’s to **make traction inevitable by creating clarity, differentiation, and proof.**

- **Start with Pain, Not Features** → Anchor all messaging in the customer’s urgent problem. Features only matter in the context of what they solve.
- **Rebuild the Story Using Lean Canvas** → Revisit Problem, Segment, and UVP blocks. Ensure the message reflects validated pains and segments, not assumptions.
- **Simplify, Then Repeat** → Create a core positioning statement so simple your customer can repeat it back. Train every team to use it consistently.
- **Differentiate Against Competitors** → Map the landscape. Highlight what makes you distinct in ways that matter to buyers, not just to insiders.
- **Back It with Proof** → Build social proof: case studies,

customer logos, testimonials, ROI data. Make evidence part of the brand story.
- **Audit Every Channel** → Align website, decks, campaigns, and sales scripts so they all tell the same story. Kill off drift.

The goal isn't prettier slides or clever taglines. It's to **make customers immediately understand, believe, and choose you.**

10. Playbook 10: Venture Portfolio / Support

Signs You're Here

- **Parent org launching multiple new ventures at once** → Excitement is high, but resources are stretched thin across too many ideas.
- **Shared services spread too thin** → Centralized marketing, sales ops, or design teams can't give each venture the attention it needs. Everyone feels under-supported.
- **Portfolio of bets but no traction discipline** → Ventures measure success by launches, prototypes, or activity instead of validated traction.
- **Leadership wants ROI, but teams measure activity** → Execs ask for revenue signals, but teams report on outputs like events run or features shipped.
- **Difficulty prioritizing which ventures to double down on** → All ideas look promising on paper. Nobody wants to kill weak bets, so resources keep getting spread evenly.

- **Ventures competing with each other** → Internal politics pit ventures against each other for budget, talent, and leadership attention instead of focusing on market validation.

Why It Matters

Venture portfolios are meant to de-risk innovation by placing multiple bets. But without traction discipline, portfolios just spread risk wider instead of reducing it.

- Launching too many ventures at once dilutes resources.
- Measuring activity instead of traction creates false confidence.
- Avoiding hard prioritization keeps weak bets alive and drains stronger ones.

The danger: the entire portfolio gets labeled as "not working," even though one or two ventures might have been winners if given focus. Leadership loses patience, and the venture arm loses credibility.

Playbook Focus

The job of venture support isn't to keep all ventures alive — it's to **prove which ventures deserve scale.**

- **Apply the Market Traction Funnel (MTF) to Every Bet** → Each venture must move through MVM → MVL → MVS. No skipping steps.
- **Re-center on Pirate Metrics** → Force every venture

to measure Awareness, Acquisition, Activation, Revenue, Retention, Referral. Kill vanity metrics.
- **Ruthless Prioritization** → Review the portfolio regularly. Kill or pause ventures with weak traction signals. Double down only on the few that show repeatable proof.
- **Strengthen Shared Services** → Align central functions (marketing, ops, sales enablement) around common frameworks so they can plug in efficiently to each venture.
- **Reduce Competition, Increase Collaboration** → Treat ventures as a family, not rivals. Share learnings across teams so wins compound.
- **Report ROI, Not Activity** → Translate portfolio progress into traction signals leadership cares about: paying customers, retention, referrals.

The goal of this playbook isn't to nurture every idea equally. It's to **find, validate, and scale the few ventures in the portfolio that can become growth engines.**

11. Playbook 11: Pilot-to-Scale

Signs You're Here

- **Endless proofs-of-concept with no expansion path** → Customers agree to test but never commit beyond the pilot. Deals stall before meaningful revenue.
- **Procurement barriers in enterprise accounts** → Legal, compliance, and vendor onboarding processes drag on for months, slowing momentum to a crawl.
- **Internal champions losing influence or leaving mid-pilot** → The person who pushed for you can't close the deal internally, or leaves the company, and the initiative dies.
- **Deals dying after initial excitement** → Early enthusiasm fades once the realities of integration, adoption, or budget approvals set in.
- **Lack of land-and-expand strategy** → Even when pilots succeed, there's no plan to grow into broader usage or upsell across departments.
- **Stuck in "pilot purgatory"** → Revenue looks like a series of one-off tests instead of repeatable, scalable customer relationships.

Why It Matters

Enterprise pilots are a double-edged sword. They're often necessary to win trust, but they can become a graveyard for traction if not managed correctly.

The danger isn't running pilots — it's **running them without a scale path.** Too many startups confuse pilots with revenue, when in reality they're just expensive experiments. Without expansion, the company burns resources proving itself over and over without ever building momentum.

Even worse, long procurement cycles and internal politics mean deals can die through no fault of your solution. By the time one pilot ends, your champion is gone or budget has shifted, and you're back to square one.

Playbook Focus

The job of pilot-to-scale is to **design for expansion from day one.**

- **Define Expansion Criteria Upfront** → Every pilot should include agreed-upon success metrics and a path to scale if those metrics are hit. Don't leave next steps undefined.
- **Strengthen Champions** → Support internal advocates with ROI data, case studies, and clear narratives they can use to sell internally. Don't let them fight alone.
- **De-risk Procurement Early** → Anticipate security, compliance, and legal hurdles before they stall momentum. Prep standard responses and docs early.
- **Land-and-Expand Strategy** → Treat the pilot as the wedge. Have a roadmap for upsell, cross-sell, or broader rollout once initial value is proven.
- **Run Multiple Pilots in Parallel** → Hedge against "pilot purgatory" by spreading bets across accounts, not banking everything on one enterprise.
- **Measure Conversion to Scale** → Track the percentage of pilots that convert into real revenue and renewals.

Pilots are only useful if they become long-term customers.

The goal isn't to avoid pilots. It's to **turn pilots into predictable pipelines of expansion, revenue, and retention.**

12. Playbook 12: Go-to-Market Launch

Signs You're Here

- **Struggling to win the first 10 customers** → Early outreach and demos spark interest, but conversions are slow and unpredictable.
- **Need to build credibility with early adopters fast** → Prospects hesitate because there are no reference customers to point to.
- **No social proof to leverage** → Case studies, testimonials, and success stories are missing, making it hard to win trust.
- **Balancing speed vs. scale in launch** → Pressure to "go big" collides with the need to validate fit first. Teams aren't sure how fast to invest.
- **Channel or partner-first launches stalling** → Partnerships that looked promising don't generate momentum, leaving the direct path underdeveloped.
- **Misalignment between marketing promises and sales reality** → Campaigns oversell or misrepresent, leaving sales unable to deliver on the message.

Why It Matters

The launch stage is fragile. You only get one chance to make a first impression, and credibility is scarce until you've built a base of early adopters. Without social proof, sales cycles are longer, trust is harder to earn, and prospects default to established competitors.

The danger is trying to scale before you've proven the basics. Teams rush into expensive campaigns, hire too many reps, or chase broad markets without the traction signals to back it up. On the other hand, going too slow risks missing the window or losing momentum while competitors move faster.

A Go-to-Market launch isn't about growing fast — it's about growing right. The job is to prove the model works in the wild, with real customers, before pouring fuel on the fire.

Playbook Focus

The job of a GTM launch is to **win trust early, validate fast, and set the stage for scale.**

- **Anchor in Early ICPs** → Focus tightly on 1–2 early adopter segments most likely to feel the pain urgently and take a bet on you.
- **Run Small, Focused Experiments** → Validate messaging, channels, and pricing with a handful of high-touch customers before scaling.
- **Build Credibility Quickly** → Capture testimonials, case studies, and logos from the very first wins. Turn every early success into social proof.
- **Align Marketing & Sales** → Ensure campaigns and

sales pitches tell the same story. No overpromises, no disconnects.

- **Balance Direct vs. Partners** → If partners aren't producing traction, don't over-rely. Build your direct engine while partners ramp.
- **Measure Traction Signals, Not Just Activity** → Early Pirate Metrics (Acquisition, Activation, Revenue) tell you if the model works. Don't confuse busy pipelines with actual proof.

The goal isn't to capture the whole market overnight. It's to **earn the first 10 customers, build credibility, and create a repeatable system you can scale.**

IV

BUILDING YOUR TRACTION ENGINE

Up to this point, we've covered the pieces of the engine and the playbooks for diagnosing where you're stuck. But knowing the parts isn't the same as running the machine.

This final section is about **turning frameworks into motion.**

A traction engine doesn't get built overnight. It's not about writing a perfect plan, or reorganizing the org chart, or waiting until every block of the Lean Canvas is proven. It's about starting where you are and creating momentum.

That's what the next two chapters are designed to do:

- **The First 90 Days** → A practical roadmap for putting the traction engine in place inside your organization, one step at a time.
- **Traction Labs in Practice** → Real-world stories and examples of how teams have used this process to break through stalls, launch new ventures, and create traction where none existed before.

Think of this section as the bridge between **diagnosis and execution.** The earlier chapters gave you the mindset, the tools, and the troubleshooting guide. Now we move into *application*: how to build, test, and prove your traction engine in the real world.

The point isn't to get it perfect. The point is to get it moving.

1. The First 90 Days

Building a traction engine can feel overwhelming if you treat it as a giant project. The key is not to do everything at once — it's to build momentum in phases. That's why we use a **90-day launch plan**: three clear phases that turn frameworks into a working system.

Month 1: Traction Lab (Model)

Goal: Build the Minimum Viable Model (MVM). Get the first clear picture of who you serve, what problems you solve, and how traction will be measured.

What happens this month:

- **Week 1: Attraction Focus** → Define ICPs, refine problem statements, and map channels.
- **Week 2: Conversion Focus** → Test UVPs, draft early pricing and revenue streams, clarify sales metrics.
- **Week 3: Expansion Focus** → Define solution delivery, cost structure, and unfair advantage.
- **Week 4: Lab Review** → Pull it together. Review the Lean Canvas, assemble baseline Pirate Metrics, identify riskiest assumptions.

By the end of Month 1, you've got a living model and shared language for your team.

Month 2: Traction Engine Build (Execution)

Goal: Move from model to engine. Equip the team with the plays, tools, and rhythms to test and execute.

What happens this month:

- **Week 5: Growth Initiative Prioritization** → Identify a portfolio of plays (ads, outbound, referral asks, pricing tests). Prioritize by effort/impact.
- **Week 6: Tools & Assets** → Set up CRM, ad accounts, sequences, dashboards. Gather creative, case studies, and lists.
- **Week 7: Play Design + Team Onboarding** → Build playbooks, landing pages, campaigns, and onboard SDRs/marketers/CX into the system.
- **Week 8: Launch + Review** → Go live with the top plays. Begin tracking traction in Pirate Metrics. Review early wins and bottlenecks.

By the end of Month 2, the engine is running with real campaigns and sales motions in market.

Month 3: Ongoing Traction Sprints

Goal: Install continuous motion. Build habits of reviewing, testing, and iterating every 4–6 weeks.

What happens this month (and ongoing):

- **Canvas + Pipeline Review** → Re-score assumptions (RYG) and assess traction against Pirate Metrics.
- **Traction Play Execution** → Keep running plays across GTM, Sales, and CX.
- **Pivot / Persevere Decisions** → Decide which plays to double down, adapt, or cut.
- **Growth Fuel Deployment** → Invest $2K–$3K per person per sprint into next-priority plays.
- **Team Sync & Coaching** → Reinforce learnings, tighten rhythms, improve execution.

By the end of Month 3, you've moved from "launching" to "looping" — the engine is learning, adapting, and compounding.

Why the 90-Day Plan Works

- **Pace over perfection.** The plan avoids overwhelm by sequencing discovery, execution, and iteration.
- **Shared accountability.** Every leg of the stool (Attraction, Conversion, Expansion) has a role to play each month.
- **Evidence-driven.** Decisions to pivot, persevere, or scale come from Pirate Metrics, not opinions.

The First 90 Days are about proving the system works inside your business. After that, the job is to keep the wheel spinning.

2. Traction Labs in Practice

Frameworks are useful. Playbooks give you clarity. But nothing makes it real like seeing the work in practice.

In this final section, we've included a handful of anonymized case studies — real teams, real stalls, and how the Traction Lab process helped them break through. The names are withheld (many of these are under NDA), but the patterns are clear. These examples are meant to help you see your own story in theirs.

Case Study 1: From Zero Sales to First Customers

A B2B software company had spent years and millions building a SaaS platform to help mid-sized manufacturers spot inefficiencies and improve performance. The technology worked — but sales weren't coming. The original pitch felt misaligned with the leaders they were targeting, and the 3–4 week setup before showing any value caused deals to stall out.

What we did:

- Built a **manual MVP assessment** that delivered actionable value in 30 minutes instead of 30 days.
- Pivoted messaging from broad, high-level outcomes to **specific operational pains** (like customer churn or delays) that prospects already recognized.
- Reframed demos around **quick wins** that proved value immediately instead of asking for long implementations.

Result: Within 60–90 days, the company went from **zero demos booked in the last 12 months** to 3 paying customers and a healthy pipeline of 10–15 active deals.

Case Study 2: Founder-Led Sales to Scalable Growth

A $50M ARR company had grown entirely through founder-led sales. The founder's network carried them, but growth hit a ceiling. Messaging was vague, the ICP was unclear, and the sales cycle stretched to 12–24 months in a highly regulated industry.

What we did:

- Ran a **Lean Canvas + MTF workshop** to nail down the ICP and "aspirin problem" to focus on.
- Shortened the sales motion by creating a smaller and quicker value entry point (3-month cycle) that opened doors for larger service contracts.
- Captured the founder's instinctive language and turned it into a **repeatable sales playbook**.

Result: The company built its first repeatable **traction engine** — moving from unpredictable founder-led sales to a scalable system that could be taught and repeated.

Case Study 3: Shrinking Pilots, Growing ROI

A large private company (Fortune-500 scale) needed to speed up their RFP process. Projects dragged on for weeks, wasting resources and hurting win rates.

What we did:

- Used AI to **record and ingest meeting transcripts**, utilize previous RFPs, and crafted an AI pipeline to draft RFP responses in hours instead of weeks.
- Helped the team shift time from admin work to **strategic bid strategy** — focusing on how to win, not just how to respond.

Result: RFP turnaround time dropped from weeks to under a week, **increasing throughput and win rates**.

Case Study 4: Innovation Program Reset

An enterprise innovation department looked busy — but wasn't gaining traction. They were producing prototypes, but projects were driven by regulatory checkboxes and vendor pitches rather than customer demand.

What we did:

- Ran a **one-day Innovation Lab** assessment, scoring them across strategy, ideation, validation, execution, organization, playbook, and X-Factor.
- Helped leadership realize they weren't an "innovation team" but a **pilot team** stuck between feasibility and viability.
- Guided a **re-org** to centralize innovation and tie efforts to long-term business outcomes.

Result: The company repositioned its "innovation theatre" into a true innovation function with a clear mandate, traction focus, and leadership buy-in.

The Common Thread

At City Innovations, now through Traction Labs, we've worked with hundreds of businesses to find traction and these are just a few examples. Ultimately, every one of these stories looks different on the surface — stalled sales, founder dependency, diversification, AI initiatives, corporate labs, etc. But the pattern was always the same:

1. **Diagnose the stall** (using Lean Canvas + Pirate Metrics).
2. **Test systematically** (with the Market Traction Funnel).
3. **Reframe and reposition** around urgent customer pains.
4. **Build a repeatable engine** that compounds traction.

That's what Traction Labs does. And that's what you can do with this Field Manual inside your own team.

Where We Play

If you've seen yourself in these stories, you're not alone. Most teams get stuck somewhere along the way — which is why we built playbooks for the most common scenarios:

- **Stalled or Plateaued Growth**
- **New Venture Launch**
- **Innovation Programs**
- **AI & Tech Initiatives**
- **Strategic Shifts**
- **Diversification & Diverse Business Unit (DBU) Plays**
- **Market Expansion**

- **M&A / Rollouts**
- **Brand / Messaging**
- **Venture Support**
- **Pilot-to-Scale**
- **Go-to-Market Launch**

Wherever you're stuck, there's a playbook here. The point isn't to be perfect — it's to get the wheel moving again.

TRACTION LABS

A Traction First company by
City Innovations

https://tractionfirstbook.com/