[2026 EXAMPLE REPORT]

GTM Diagnostic Report

AI Era GTM Due Diligence

ACME®

Acme is a fictional company

EXAMPLE REPORT

DemandKarma

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About this example

This report demonstrates the format, depth and approach of a Demand Karma GTM Diagnostic. Acme is a fictional company. Its financial and operating data, interview findings and supporting documents have been created for this example.

This is not a redacted client report. It contains no confidential client information and does not describe or assess any real company.

The projections, sensitivities and recommendations illustrate how we evaluate a growth plan and identify priorities. They are not forecasts or guarantees of performance, or advice for another business. A client diagnostic would be based on that company's evidence and an agreed scope of work.

01

[2026 CONFIDENTIAL REPORT]

Process and Inputs

This was the process

The High-Level Process

SUBJECT

GTM Diagnostic (September 2026)

DISTRIBUTION

CEO, CFO, Board Members

The High-Level Process Explained

Demand Karma undertook a GTM diagnostic for Acme, a B2B SaaS performance and talent platform serving UK and Irish employers, forecasting £7.4m ARR at the end of 2026. AI-assisted review drafting and skills recommendations were added in 2025. Acme forecasts 26% ARR growth in 2026 and aims for 40% annually from 2027, reaching £20.31m in 2029. Its plan targets 120% NRR, operating breakeven in 2027 and improving profitability thereafter.

We reviewed the 2027 commercial plan and the GTM strategy, engine and people needed to sustain growth over three years. The assessment considers the decisions required to strengthen demand creation, customer expansion and leadership capacity.

Our review combined the financial model, commercial performance and operating documents with interviews with the CEO, Chair, CFO, functional leaders and Revenue Operations Manager. We examined the assumptions behind the growth case, the customer evidence informing market choices and the way the functions work together.

The findings are based on the information provided by Acme in writing and in discussion. Changes to that information may affect the conclusions. We assessed leadership and functional performance. We did not interview the whole GTM team or make direct judgements about individual contributor capability.

This report sets out the principal risks, the proposed organisation and the priorities for improving performance. The CEO and board determine the response. Acme owns investment decisions, governance and implementation.

Inputs: What Happened

Requested

Strategy and financials. 9 Documents, including:
→ Corporate strategy and growth plan
→ Historical and forecast performance

Sales. 11 Documents, including:
→ Sales process and playbook
→ Pipeline, bookings and win/loss data

Marketing. 12 Documents, including:
→ Marketing strategy and program spend
→ Campaign and funnel metrics

Customer Success. 8 Documents, including:
→ Support volumes and workflows
→ Onboarding and renewals processes

Revenue Operations. 10 Documents, including:
→ CRM architecture and data quality
→ Key reports and KPIs

AI readiness. 6 Documents, including:
→ AI tools currently in use
→ Automation examples and governance policies

Internal calls

→ **Chief Executive Officer**
→ **Chair**
→ **Chief Financial Officer**
→ **VP Sales**
→ **Head of Marketing**
→ **Head of Customer Success**
→ **Revenue Operations Manager**

What happened, where are we (and in what order)

1. We requested 62 documents and received 56. The gaps sat mostly in AI governance and data policy, which is itself a finding.
2. Stakeholder calls and remote meetings were conducted to discuss challenges, opportunities, and execution blockers.

   WE ARE HERE ↓
3. Report sent and reviewed, and a debrief (to happen) with Leadership, board and/or functional heads.

   THE NEXT STEP ↓
4. Recommendations then need to be acted upon based on LT / board decision making.

02

[2026 CONFIDENTIAL REPORT]

Executive Summary

The headline findings, the GTM Diagnostic, and whether the plan is deliverable

Executive Summary

Overall

Acme has a useful product, strong retention and a sales team that converts well. Sector knowledge, product understanding and reliable service processes provide a sound base for growth.

Gross retention of 95% and a 30% new-business win rate support those strengths. The 2026 forecast is £7.4m ARR, up 26%. The modest expansion target has been met, although it understates the potential in the customer base.

Revenue performance is being held back by how GTM is organised and led. Marketing has not scaled demand beyond the current business. The ICP is too broad, the reasons buyers act are not clear enough, and customer expansion is reactive.

Separate functional plans, uneven leadership and slow customer learning leave effort disconnected from the customer journey. Inconsistent AI use adds work without demonstrated benefit. These weaknesses constrain pipeline creation and account growth, limiting Acme's ability to sustain 40% annual growth.

Primary Risks Identified

1. Demand has not scaled beyond the current business. Marketing's attempts to open new channels have not materially increased qualified demand. Unclear ICP choices, buying reasons and differentiation weaken both marketing investment and outbound. Strong conversion cannot compensate for too few suitable opportunities.

2. GTM is siloed. Leadership and maturity differ across functions, each working to its own plan and view of success. The customer journey is disconnected. Overlapping activity, missed handovers and conflicting priorities waste effort because the strategy is defined by function rather than across GTM.

3. Customer expansion is underdeveloped. Accounts are not assessed consistently for future potential or the needs Acme could address beyond today's use. Sales, Marketing and CS lack a proactive, shared approach to developing those opportunities. NRR is constrained by what is identified, not simply by the ability to close.

4. Buyer change is outpacing GTM adaptation. Acme's understanding of its ICP, buying triggers and customer priorities is becoming stale. Signals from conversations and win/loss experience do not update the approach quickly enough. The pace of learning remains too slow for the AI era, putting future performance at risk.

5. AI usage is growing without demonstrated commercial impact. Adoption is organic and inconsistent, with no shared strategy, priorities or maintained customer context. Roles, review standards and ownership are unclear. Costs and technical debt are increasing while the value and scalability of the work remain unproven.

Can this GTM deliver the plan?

The plan grows ARR from **£7.4m in 2026 to £20.31m in 2029**, at 40% a year. The 2027 step requires **1.7x current new-business pipeline creation and 4x expansion pipeline**, with NRR rising to 120%. Conversion is a strength. **Demand creation and account growth do not yet support the plan.**

VERDICT

Only under these conditions

THE PLAN WE ARE BACKING INTO

YEAR	ARR YEAR-END	GROWTH	NEW:EXP
2026	£7.40m	26%	74:26
2027	£10.36m	40%	44:56
2028	£14.50m	40%	44:56
2029	£20.31m	40%	44:56

2027: £2.96m net ARR growth, from £1.48m new business and £1.85m gross expansion, less £0.37m lost ARR.

Plan basis. 2026 is the forecast. 2027 to 2029 assume 40% annual growth, 120% NRR and 95% GRR. New:Exp is the rounded split of gross new-business and expansion ARR sold. Breakeven is targeted in 2027.

WHAT THE 2027 PLAN REQUIRES VS WHAT THE CURRENT GTM ENGINE PRODUCES

GTM ENGINE METRIC	REQUIRED	ACTUAL	GAP
New business pipeline / Q	£1.233m	£0.725m	**1.7x**
Expansion pipeline / Q	£0.771m	£0.193m	**4.0x**
Annual AE quota	£500k	£400k	**+25%**
Annual ARR output / AE	£400k	£340k	**+18%**
NRR run rate	120%	103%	**17 pts**
GTM CAC ratio	≤1.0x	1.2x	**-0.2x**

Actual pipeline is creation in the latest quarter. Other actuals use trailing 12 months to September 2026. Earlier pipeline supports the 2026 sales forecast.

How required is derived. Quarterly pipeline = annual ARR ÷ win rate ÷ 4, at 30% new business and 60% expansion. AE output assumes 80% attainment, versus 85% today. GTM CAC = Sales + Marketing + commercial CS cost ÷ new and expansion ARR sold. Figures rounded. GBP.

THE CONDITIONS

- → **Scale qualified demand.** Focus targeting and channel investment on the strongest buying reasons. Create £1.23m of new-business pipeline per quarter at a 30% win rate.
- → **Build proactive account growth.** Deliver £1.85m of expansion through account development, pricing and product value. At 95% GRR, 25% gross expansion produces 120% NRR.
- → **Support higher seller productivity.** Four AEs need £500k quota at 80% attainment. The quota is 25% above today. At current £340k output per AE, a fifth seller is needed.
- → **Control GTM cost.** £3.33m of new and expansion ARR allows £3.33m of included commercial cost at 1x CAC. Recruitment, channels and commercial CS costs must fit.

Numbers vs Benchmark

Sales converts well. The 30% new-business win rate and 85% trailing quota attainment are relative strengths. Latest quarter-opening pipeline coverage is weaker at 2.3x. Good past selling does not remove the risk of insufficient future opportunities.

Gross retention of 95% is strong. NRR of 103% shows some customer growth, but the 120% target requires a more deliberate expansion approach. Customers are staying. Their future potential is not being developed systematically.

Quota coverage is only 1.0x: there is no allowance for less than full attainment against the company's new-business target. The 1.2x GTM CAC ratio also points to expensive growth. Better demand creation and customer expansion matter alongside selling performance.

METRIC	REFERENCE	CURRENT
GRR	92%	95%
NRR	120%	103%
Win rate	25% to 30%	30% New Business 60% Expansion
Quota attainment	80%+	85%
Pipeline coverage	3x to 4x	2.3x
Quota coverage	≥1.25x*	1.0x
GTM CAC ratio	≤1.0x	1.2x

Periods: retention, win rates, attainment and CAC use trailing 12 months to September 2026. Win rates are by ARR. Four AEs have £400k annual quotas. 85% mean attainment gives £1.36m of new ARR over that period.

Pipeline coverage: £0.92m of qualified new-business pipeline due this quarter ÷ £0.40m target = 2.3x. This is opening coverage, not new pipeline created during the quarter.

* Quota coverage: £1.60m assigned AE quota ÷ £1.60m company new-business target = 1.0x. At 80% planning attainment, 1.25x is the minimum arithmetic cover before ramp or vacancy buffers.

GTM CAC: Sales + Marketing + the commercial share of CS cost ÷ new-business and expansion ARR sold in the same period. Excludes renewal ARR and CS service-delivery cost. This report uses that definition, not gross-profit-based new-logo CAC.

References are directional, not matched-cohort market medians. The 120% NRR figure is also the 2027 plan target. Current performance has not demonstrated it.

AI Risk Exposure

We help investors, boards, and CEOs evaluate AI era company viability from a GTM lens. This exposure view sits alongside the maturity assessment: it asks how durable Acme's product, market, and motion are as AI reshapes both buying and delivery.

Product defensibility

POTENTIAL STRENGTH

Workflow depth and years of HR data protect the core. Agentic capability in-product is the defensible move.

Data leverage

PARTIAL STRENGTH

Rich performance and skills data inside each account, but no network effects or cross-customer learning.

Use case durability

STRENGTH

Performance and workforce planning are high stakes. The jobs survive AI. The tools that do them will change.

ICP durability

PARTIAL STRENGTH

HR teams face AI headcount pressure of their own. Seat-based revenue tied to HR team size is exposed.

GTM approach

RISK

The demand engine is built on channels AI is dismantling. Buyers shortlist through LLMs, where Acme is invisible.

Customer insight

RISK

Engagement is not captured in a structured way. No agentic (or manual) process identifies AI risk in the base.

Actions

- → Audit how Acme appears in LLM-generated category and vendor answers, then fix visibility with structured, citable content.
- → Capture all customer engagement (calls, meetings, emails, tickets) into an enriched CRM: the foundation every agentic workflow depends on.

GTM Diagnostic Heatmap

OVERALL SCORE 2.4 / 5

1 · Absent/limited 2 · Gap 3 · Average 4 · Ahead 5 · Far ahead

	Marketing	Sales	Customer Success	Avg
GTM STRATEGY				
ICP & Buyers	Gap	Ahead	Average	3.0
Value proposition & Differentiation	Gap	Average	Average	2.7
AI Era Adaptation	Average	Gap	Gap	2.3
GTM commercial model	Gap	Average	Gap	2.3
ENGINE				
Execution	Gap	Ahead	Gap	2.7
Process & Playbooks	Gap	Average	Average	2.7
AI impact	Absent/limited	Absent/limited	Absent/limited	1.0
Data & Systems	Average	Average	Ahead	3.3
PEOPLE				
Leadership	Gap	Average	Gap	2.3
Skills & Experience	Gap	Average	Gap	2.3
GTM Operating Model	Gap	Gap	Gap	2.0
GTM Operating Rhythm	Gap	Gap	Gap	2.0
Function avg	2.1	2.8	2.3	

The five-stage AI framework assesses the way AI is used. This heatmap assesses functional capability and demonstrated impact. AI impact scores 1 because commercial benefit is not established, despite Level 3 adoption. All 12 dimensions are weighted equally. These are functional assessments, not ratings of individual contributors.

GTM Strategy Findings

ICP & Buyers

Acme is most convincing with UK and Irish employers of 250 to 2,000 people, where an HR director wants more consistent performance and talent management. Sales understands the buying group: HR sponsors the change, Finance tests the return and IT reviews integration and data. That knowledge is stronger in live deals than in Marketing's account selection.

Marketing targets a wider market, including smaller employers and complex enterprises. Outbound is not concentrated enough on the segments that convert best. The company is also too distant from changing buying triggers. Calls and emails contain useful signals, but those signals do not routinely change ICP choices, account selection or the reasons used to approach a buyer.

Value proposition & Differentiation

The core proposition is established: replace fragmented review and talent processes with one platform that HR can manage. Customer retention supports the product's practical value. Sales can explain its benefits and handle competitive opportunities.

The broader story combines ease of use, insight and AI without being specific enough about why a buyer should act now. Proof is stronger on adoption than on management effectiveness or financial return. That weakens new-channel development and expansion conversations. More features do not create an opportunity unless the customer sees a material reason to buy them.

AI Era Adaptation

Marketing has made more practical use of AI than Sales. Acme's review drafting and skills recommendations, added in 2025, give it a relevant product story. Sales materials and the established demonstration provide less support for newer questions about AI value, limits, data and trust.

Acme has no consistent view of how AI is changing the buyer's job, evaluation or willingness to pay. Customer Success holds useful product and service information, but the commercial implications are not routinely shared. A narrower ICP must remain responsive to these changes. Freezing today's best customer profile for three years would create a different risk.

GTM commercial model

The 2027 plan asks GTM to move from 103% to 120% NRR while growing ARR by 40%. At 95% gross retention, that requires £1.85m of gross expansion alongside £1.48m of new-logo ARR. Expansion has been treated as a modest target rather than a funded source of growth.

The required pipeline and capacity are not yet supported by current performance. Investment remains divided by function, making it difficult to compare acquisition with customer growth. The model also assumes higher seller productivity and a lower GTM CAC ratio. Those assumptions require evidence, commercial ownership and a joined-up plan.

GTM Engine Findings

Execution

Sales performs well in the opportunities it receives. Qualification, deal progression and closing are established strengths. Outbound is less mature, with inconsistent targeting and weak coordination across Sales and Marketing. The cross-functional approach has not been clearly enabled or made accountable for results.

Marketing's new investment has not materially improved performance. Activity appears better at capturing existing demand than creating it. The results indicate gaps in the experience and support available for new channels. CS delivers the service reliably, but commercial account growth remains reactive.

Process & Playbooks

Specific sales, onboarding and renewal processes are documented. There is less evidence of regular coaching, enablement or updates that keep them in use. The documentation is becoming stale, or diverging from what teams actually do. There is no end-to-end customer journey connecting those processes and handovers.

The guidance describes tasks more clearly than the customer value and experience each stage should deliver. Teams qualify and pitch without a shared view of how to help the customer reach a decision sooner. That weakens conversion and consistency across acquisition, onboarding and expansion.

AI impact

Individuals use AI for research, content, seller preparation and service work. There is no overall strategy, shared best practice or maintained context layer. Builds accumulate without consistent review and improvement. The variation in quality is widening, with more technical debt and no dependable measure of commercial benefit.

RevOps enables features within existing systems but does not yet have the capability to lead AI across GTM. Subscription costs and time spent building are increasing. Without shared ownership and technical support, local experiments consume capacity and remain difficult to maintain or scale.

Data & Systems

CS has the strongest functional data set, combining usage, support history and renewal dates. Sales maintains usable opportunity records and a regular forecast. These assets provide a starting point for improving the common view, without assuming wholesale platform replacement.

Calls, transcripts and emails are not consistently connected to account history, buying triggers and outcomes. Acquisition and expansion reports use different definitions. RevOps is mainly reporting support. The missing capability is a maintained body of customer evidence that leaders use to refine ICP, messaging, account priorities and the next commercial decision.

People Findings

Leadership

The VP Sales runs a function with good current results. His incentive follows the combined quota of his team, but the approach to scaling towards £20m ARR is less developed. Current selling performance does not establish that the leadership model is ready for that next stage.

The Head of Marketing has progressed from individual contribution and remains focused on execution rather than strategy. CS leadership understands support and the product, but is not sufficiently value-led with customers or equipped, coached and incentivised to uncover commercial opportunity.

Skills & Experience

There is useful sector knowledge and experience in selling, product support and service delivery. The larger gaps concern strategic use of AI and experience of the next stage of growth. The leadership team needs support to understand how its responsibilities and approach must change as the company scales.

AI use has grown faster than the ability to direct and improve it. Briefing, context, output review and feedback are inconsistent. These findings concern leadership, functional results and observed working practices. Leadership interviews do not support direct judgements about individual contributors.

GTM Operating Model

Each function has defined its own roles, processes and responsibilities. The joins between them are incomplete, with overlapping activity and gaps in customer ownership. There is no overall design connecting new business, adoption, retention and expansion, or clarifying where investment would improve the whole journey.

Marketing's role effectively stops at opportunity creation. Sales owns the deal, while CS owns product use and service. Future account potential and commercial development fall between them. This weakens the basis for allocating resources and holding leaders accountable for the combined result.

GTM Operating Rhythm

Functional planning and performance reviews sit outside the weekly leadership meeting, with board reviews prepared separately. Priorities are not consistently reconciled. Sales, Marketing and CS roll out different initiatives without a shared ICP or coordinated approach to prospects and customers.

The result is friction between teams and a reactive customer experience. Marketing has limited visibility beyond the opportunity, while CS identifies some renewal risks too late. Customer signals and AI learning do not reliably change the next decision across GTM.

03

[2026 CONFIDENTIAL REPORT]

GTM Primary Risks

The five risks, the evidence behind them, and the actions to take

Demand Has Not Scaled

Acme needs £1.233m of qualified new-business pipeline each quarter for the 2027 plan, against £0.725m created in the latest quarter. Adding sellers before addressing that shortfall would spread the same opportunities across more capacity. Of the latest pipeline, 38% came from employers outside the 250 to 2,000 employee profile. Historical win rates were 17% outside that profile and 34% within it. That difference warrants a focused test; it does not establish that firmographic targeting alone causes better conversion.

Marketing is measured on leads and MQLs for 61% of programme spend. No channel reports qualified pipeline per pound. Nine events have no attributed pipeline, which means their contribution is unknown, not necessarily zero. Inbound volume rose 3% year on year, while median first qualified contact took nine hours. The Head of Marketing described a function responding to its lead target. Change the measures and the choices they drive before increasing the budget.

The 22 loss reviews record one primary reason each: 14 no decision or incumbent process, five price and three a named competitor. Most losses concern whether to act at all. Review those 14 decisions by customer problem, urgency and buying group. Test a reason to change with a defined customer segment, rather than assuming more activity or a different message will create demand.

Demand Has Not Scaled

Acme has proof to develop: 118 customers, 95% gross retention and implementation records showing time to first completed review cycle. In three of the five most recent wins, a reference call provided decisive reassurance. These are useful starting points, but adoption and retention do not establish financial return. Interview those customers about the change achieved, the implementation effort and the measurable benefit. Package only the claims their evidence supports.

The current 30% win rate and 94-day median sales cycle provide a baseline. The 1.2x GTM CAC ratio signals a cost problem but does not, on its own, identify which channel caused it. Compare spend, qualified opportunities and eventual ARR for the same acquisition cohorts. Review leading evidence monthly; allow opportunities to mature before making a final judgement on return.

The first test is a focused acquisition programme using the strongest observed customer profile and a specific buying trigger. The Head of Marketing owns the test with VP Sales: agreed qualification, response within one working hour, and a buyer value case used in live deals. Review account engagement and qualified pipeline after 30 days, and conversion as cohorts mature. Increase investment only if opportunity quality and cost improve. The target remains £1.233m of qualified pipeline a quarter; it is not a promised 90-day result.

Demand Has Not Scaled

Actions

- → Refine the priority ICP, buying reasons and differentiation from the 22 loss reviews and current customer conversations, and establish a monthly routine for updating those choices.
- → Concentrate the first acquisition test on the stronger historical profile. Retain exceptions with a clear buying reason and compare results by segment and channel.
- → Report channel spend against qualified pipeline and eventual ARR by cohort. Review monthly, allowing for the 94-day median cycle before judging realised return.
- → Build a Finance-ready value case from customer interviews and implementation evidence. Separate measured outcomes from estimates and reference-call reassurance.
- → Introduce an initial response within one working hour and track time to qualified contact separately. Agree routing and qualification with Sales.
- → Use the £1.233m quarterly pipeline requirement and 1.25x minimum quota coverage to test capacity. Add ramp and vacancy cover before approving recruitment.

Owners and timing follow the Horizon 1 to 3 plan in section 06. These actions specify the evidence and operating changes required.

Success looks like

The first cohorts show stronger qualified demand at an understood cost, and a credible route to £1.23m quarterly pipeline. Review pipeline quality, response time and conversion together; lead volume alone is insufficient.

GTM Is Siloed

We observed three weekly functional meetings and no commercial one. Sales reviews deals, Marketing reviews activity, Customer Success reviews service and renewals, and roughly 70% of the weekly leadership agenda is operational. The board pack is assembled by the CFO from three functional decks, and pipeline is defined two ways within it. The Revenue Operations Manager described being able to give the pipeline number three ways depending on who asked. The heatmap scores GTM Operating Model and GTM Operating Rhythm at 2.0, the lowest shared scores in the assessment, consistent with the fragmented decisions observed in those meetings.

The handovers show the cost in the customer record. Of 46 onboardings in the last year, 18 recorded the objective the buyer was trying to achieve. The median first contact from Customer Success came nine days after signature. Marketing has no visibility of an account after the opportunity is created, and CS has no view of what was promised in the sale. The Head of CS summarised it: the team knows who is happy, and nobody has asked them who could buy more. Each function holds a piece of the customer and none holds the customer.

Decisions escalate because there is nowhere else for them to go. The CEO described being the tie-breaker between Sales and Marketing most weeks. The Chair described the board seeing three functional updates rather than one commercial plan. Both are accurate, and both are symptoms of the same gap: no forum reconciles pipeline creation, expansion, retention, capacity and cost, so trade-offs between them are made by escalation, late, or not at all.

GTM Is Siloed

The 2027 plan depends on a 44:56 split between new business and expansion, and the business cannot currently manage that split because acquisition and expansion are reported on different definitions. Investment is decided by functional budget, not by return. The CFO was candid that the 120% NRR assumption was inherited rather than evidenced. Without one commercial view, the plan's central assumption has no owner and no monthly test.

The functions are at different stages and each is scaling its own way. Sales, at 2.8, has qualification and deal review that work. Marketing, at 2.1, is led from execution. CS, at 2.3, is reliable in service and reactive commercially. Those differences are normal at £7m ARR. The risk is that the strongest function pulls the plan toward what it already does well, more of the same deals, while the two functions the plan depends on most for growth, demand and expansion, are the least equipped to argue for investment.

Start by changing decision ownership and the operating rhythm with the current team. One monthly GTM decision forum that reconciles demand, retention, expansion, capacity and cost and records its decisions. Cross-functional new-business and expansion teams meeting weekly against joint targets. Mandates that say who owns the customer at each stage. RevOps with the remit to settle definitions. By month three the board should receive one pipeline number, one expansion number and one plan, prepared from the same view the leaders use.

GTM Is Siloed

Actions

- → Start one monthly GTM decision forum that reconciles demand, retention, expansion, capacity and cost, with a record of decisions, owners and follow-through.
- → Put cross-functional new-business and expansion teams into a weekly rhythm with joint targets, agreed customer ownership and defined handovers from engagement to commercial decision.
- → Settle leadership mandates: Marketing owns market choices and qualified pipeline, VP Sales owns new business and account growth, Head of CS owns adoption, retention and value realisation.
- → Give RevOps a GTM-wide remit for funnel definitions, customer context and performance reporting, so acquisition and expansion are measured the same way.
- → Record the buyer's objective at every handover and make it the first item in onboarding, with CS contact inside 48 hours of signature.
- → Move functional reviews into the leadership rhythm and prepare board reporting from the same commercial view the leaders use.

Owners and timing follow the Horizon 1 to 3 plan in section 06. These actions specify the evidence and operating changes required.

Success looks like

One commercial plan the three functions work to, a monthly forum where the growth case is reconciled rather than reported, one pipeline definition, and a customer record that carries the buyer's objective from first meeting to renewal.

Customer Expansion Is Underdeveloped

At 103% NRR, the 2027 growth plan needs £2.74m of new-logo ARR. At 120%, it needs £1.48m. The £1.26m difference is the most consequential unproven assumption in the commercial plan. At £400k output per productive seller, the lower-NRR case requires seven sellers rather than four, before ramp and vacancy cover.

Acme has 118 customers. Thirty-one increased usage by more than 25% without a commercial conversation, and 42 have never had a structured value review. These groups may overlap. They identify where to investigate; usage growth may fit within an existing licence, and a review may reveal unmet service needs rather than an opportunity to sell.

The existing expansion business has a 60% win rate by value across 23 opportunities and a 41-day median cycle. That makes customer growth a sensible first test. It does not prove that four times as much pipeline will convert at the same rate. Latest-quarter creation is £0.193m against the £0.771m quarterly requirement.

VP Sales owns commercial validation until the Account Manager arrives. CS leads the value conversation and protects adoption and retention. Assess need, entitlement, incremental value, budget, sponsor and buying date before recording an opportunity. The next page separates a plausible opportunity pool from the £1.85m expansion target.

Expansion: what must be true

£1.85m is a plan requirement. The account signals do not yet establish that this revenue is available.

Source of incremental ARR	Illustrative sizing assumption	Pool	What must be validated
Additional paid licences and wider deployment	30 accounts × £40k	£1.20m	New teams or entities outside current entitlements, a sponsor and a funded rollout.
Additional talent and workforce-planning modules	25 accounts × £38k	£0.95m	An unmet need, additional value and willingness to pay. Included AI features stay included.
Renewal pricing and packaging	70 accounts × £5k	£0.35m	2027 renewal dates, contractual scope, value evidence and retention risk.
Unqualified hypothesis pool	**Account counts overlap**	**£2.50m**	**One account ledger; count each incremental revenue line once.**

Even this pool does not support the target

If all £2.50m qualified and 60% converted in 2027, expansion would be £1.50m: **£350k below plan**. At that same rate, the plan needs £3.08m of qualified opportunity, £583k above this entire unqualified pool.

Validate before relying on the revenue

These counts and prices are sizing assumptions, not observed demand. Reconcile them with all 118 accounts; include existing opportunities within the pool. Remove duplication, unsupported prices and buying dates outside 2027.

The historical 60% rate is a sensitivity, not a forecast for new offers. Test conversion by lever. Pipeline creation of £0.193m in the latest quarter is a flow measure, not an opening pipeline balance to add to this pool. Protect 95% GRR when testing pricing.

Customer Expansion Is Underdeveloped

Actions

- Start with the 31 usage-growth accounts. Check contracted entitlements and customer intent before estimating additional paid licences or wider deployment.
- Run value reviews for the 42 unreviewed customers, prioritised by renewal date and potential. Combine overlapping accounts in one review queue.
- Give each qualified opportunity an incremental ARR value, sponsor, next step, buying date and commercial owner. VP Sales covers ownership until the Account Manager arrives.
- Test module and pricing proposals with customers. Keep included AI features within existing entitlements; charge for additional value only where customers validate it.
- Reconcile the opportunity pool with the £1.85m requirement. Remove duplicate value and deals outside 2027; stress-test conversion and retention before funding the plan.
- By the month-three review, show what supports 120% NRR and what remains a gap. Decide whether to extend the test, change investment or revise the growth case.

Owners and timing follow the Horizon 1 to 3 plan in section 06. These actions specify the evidence and operating changes required.

Success looks like

The board can distinguish signals, qualified pipeline and committed expansion, with no double counting. It can see the remaining gap to £1.85m and act before relying on 120% NRR. Existing-account growth remains conditional on customer value and retention.

Buyer Change Is Outpacing GTM Adaptation

Acme has not systematically revisited its ICP, buying triggers or customer priorities since the first £7m of ARR. The diagnostic found gaps between recent buyer questions and the materials used to answer them. The immediate task is to update the commercial response using customer evidence, while testing how much buyer research and evaluation have changed.

An illustrative visibility check used ten buyer-style questions across three AI assistants, giving 30 answers. Acme appeared twice, compared with 21 and 17 appearances for two competitors. Its descriptions were out of date. This small sample identifies a visibility issue to investigate. It does not show how many real buyers use those assistants or whether absence caused lost revenue. Record prompts, dates, model settings and repeated results, and ask buyers how they formed their shortlist.

Nine of twelve recent deals included an AI or data-handling question in the first two meetings. The standard deck answers none of them, so replies depend on the rep. Update materials around the questions actually observed: what data the product uses, the value of its AI features, integration effort and the return Finance can test. Product and the relevant technical owner must approve factual answers.

Buyer Change Is Outpacing GTM Adaptation

The evidence to answer all of this is already in the building. Roughly 400 recorded customer calls sit in Google Meet, not transcribed or searchable. Twenty-two loss reviews exist as notes unconnected to the CRM. Support history holds what customers struggle with and what they ask for next. None of it is connected to account history, buying triggers or outcomes, and none of it routinely changes ICP choices, account selection or the reasons used to approach a buyer. The company is collecting the learning and not using it.

The current 30% win rate was earned through the routes Acme already uses. It should not be assumed for a new channel or audience. Track evaluation questions, conversion and reasons for no decision in each cohort. If a new message raises engagement but fails to create qualified opportunities, revise the proposition or segment before buying more reach.

What Acme needs to build is a customer learning loop: evidence captured once, kept in one place, and used by leaders every month to refine ICP, messaging, account priorities and the next commercial decision. External GTM engineering can connect the sources. RevOps can maintain the context. The functional leaders own the decisions it informs and the review that tests whether the outcome improved. That loop is what the AI roadmap in section 04 exists to serve.

Buyer Change Is Outpacing GTM Adaptation

Actions

- → Establish a monthly ICP and buying-trigger review using call evidence, loss reviews and renewal signals, with the Head of Marketing accountable and the VP Marketing taking ownership on arrival.
- → Repeat the AI visibility check with recorded prompts and settings. Test useful, citable buyer content and validate discovery routes in customer interviews.
- → Rebuild the sales materials and demonstration around the questions committees now ask: AI value, data handling, integration and financial return, with one answer every rep gives the same way.
- → Connect the 400 recorded calls, the loss reviews and support history to account records, as the first shared foundation delivered by external GTM engineering.
- → Track conversion by segment and channel as new buyers are reached, and treat a fall in win rate as a learning signal rather than a selling failure.
- → Keep the narrower ICP under review as customer needs change, so market focus is revised on evidence rather than frozen for the plan period.

Owners and timing follow the Horizon 1 to 3 plan in section 06. These actions specify the evidence and operating changes required.

Success looks like

Recent customer evidence changes targeting, proof and account priorities. New-channel conversion is measured by cohort, and AI visibility is tracked as a discovery indicator rather than attributed revenue.

AI Use Without Commercial Impact

AI is in use across the GTM team and the maturity assessment places Acme at Level 3 of 5: tools bolted onto existing workflows. Marketing drafts and adapts content with it. CS uses it for knowledge retrieval and ticket triage. Sales use is individual and uneven. Adoption is real, organic and ahead of results. The heatmap scores AI impact at 1 in every function because no commercial benefit has been demonstrated: not pipeline, not conversion, not cost, not capacity.

The inventory we assembled makes the point. Fourteen paid AI subscriptions across thirteen GTM people, seven of them on expenses and invisible to Finance, four overlapping in function, roughly £2,100 a month in total. Three prompt libraries in Marketing maintained by whoever last used them. One automation in RevOps connecting web forms to the CRM. No record anywhere of what customer data has passed through which tool. There is no common owner, inventory or review standard for this work.

The current evidence cannot establish the benefit. Four AEs recorded about nine hours a week each on research, CRM updates, preparation and follow-up during a two-week log. There is no reliable before-and-after comparison. CS has used AI-assisted triage on 310 monthly tickets, about 45% routine, without measuring the effect on resolution time. Marketing reports faster drafts, but pipeline is unchanged. Establish baselines and quality checks before attributing either success or failure to AI.

AI Use Without Commercial Impact

The growth case cannot rely on any of this yet. The plan assumes seller productivity rising from £340k to £400k of ARR per AE and a GTM CAC ratio improving from 1.2x to 1.0x. AI can contribute to both, through seller preparation and follow-up, customer signal capture and expansion identification. Unmeasured savings cannot fund the plan. The board should give AI capacity gains financial credit only after they are measured and the time released has been redeployed to customer-facing work.

The AI exposure assessment raises questions about product defensibility, buyer discovery and customer insight. Test them through customer decisions: whether Acme remains essential to the workflow, what buyers will pay for, and how they evaluate alternatives. Historical HR data is a potential advantage only if it can be used to deliver value customers recognise. The discovery sample alone cannot establish commercial impact.

Start with a seller preparation workflow using existing account evidence, built with external engineering and maintained by RevOps. The worked example in section 04 shows how the same foundations can support expansion identification after the initial workflow passes review. Compare total preparation and checking time, output accuracy and time returned to customers. Extend the work only when the benefit survives routine use, and incorporate rejected suggestions into future evaluation.

AI Use Without Commercial Impact

Actions

- → Build a reviewed seller preparation workflow from maintained account evidence. Measure total preparation and checking time against the nine-hour baseline.
- → Lock baselines before any workflow scales: customer-facing time per rep, inbound response time, ticket resolution time, pipeline created, conversion and cost.
- → Inventory the 14 subscriptions, retire the four that overlap, bring the seven expensed tools under one account, and set the review standard every workflow must meet before it reaches a customer.
- → Make functional leaders accountable for the outcomes of AI work in their teams, and coach them to brief, review and improve it.
- → Extend maintained workflows into expansion identification and CS triage only when the first results show measured quality and time returned.
- → Give AI capacity gains financial credit in the hiring and profit plans only when they are measured and redeployed, and report them to the board separately from headcount changes.

Owners and timing follow the Horizon 1 to 3 plan in section 06. These actions specify the evidence and operating changes required.

Success looks like

The first workflow has a named owner, a measured time benefit and acceptable factual quality. Expansion suggestions are qualified by people before entering the pipeline. Only demonstrated, redeployed capacity is credited to the plan.

04

[2026 CONFIDENTIAL REPORT]

AI GTM Acceleration

Where AI should improve GTM performance, and in what order

AI GTM Maturity

Level 3 describes how AI is used: tools bolted onto existing workflows. AI impact scores 1 because a commercial benefit has not been demonstrated. Adoption is ahead of results.

CURRENT MATURITY

1 · AD HOC

No defined or documented go to market. Individuals improvise, and alignment lives in habit. There is no system for AI to attach to.

- → **AI usage is limited and basic. Mostly personal and siloed use.**
- → Knowledge lives in people's heads
- → Every rep runs their own approach
- → Records in inboxes and spreadsheets
- → Measurement is anecdotal

PERFORMANCE SIGNATURE

Erratic. Results depend on heroics and founder involvement.

2 · SAAS-ERA

A documented, joined-up approach: 100% human, powered by software. Effective in its time, but the buyer it targets has moved on.

- → **AI usage is limited and basic. Mostly personal and siloed use.**
- → Demand engine: SEO, paid, outbound
- → Demo-led selling proves the workflow
- → CRM in place, logging inconsistent
- → Growth model is headcount

PERFORMANCE SIGNATURE

Past success, and returns that decline year on year.

3 · BOLTED-ON AI

The same SaaS-era approach with AI bolted on for volume and speed. Amplifying an unchanged system teaches buyers to tune out.

- → **AI rolled out as point tools, each team operating in silos**
- → More volume on the same channels
- → Humans ferry context between tools
- → Reply and conversion rates declining
- → No clear AI owner, metrics inflate

PERFORMANCE SIGNATURE

A short-term lift, then decline in buyer-facing channels.

4 · AI-FIRST

GTM designed around AI with full data capture and risk-tiered autonomy. But the context is static, so impact plateaus.

- → **GTM redesigned for AI. Agents run workflows, humans at checkpoints**
- → Evals decide what ships unreviewed
- → One canonical context feeds execution
- → Proof is an eval on customer data
- → GTM engineers run the workflows

PERFORMANCE SIGNATURE

A step change, then a plateau. Trust stays manual.

5 · COMPOUNDING AI

The system learns. Agents mine calls, CRM and win-loss to rebuild the why behind outcomes, and refine their own process.

- → **AI learning loops evolve GTM and improve performance faster than humans**
- → Edge cases tackled and built into the logic
- → Autonomy expands as evals earn it
- → Positioning re-run as the market moves
- → Stale logic and context identified and removed

PERFORMANCE SIGNATURE

Measurable trust. The gap widens every quarter.

Top 20 AI GTM Use Cases

Acme's coverage of the top 20 of 200+ AI GTM use cases tracked by Demand Karma: informal use in three, none measured. 02 and 12 land first.

Implemented well | Implemented, needs work | Not in place

01 Inbound lead qualification with judgment scoring	02 Pre-call package: research brief + personalised deck	03 CRM auto-population from conversations	04 Champion job-change & promotion tracking
05 Automated win/loss with real loss-reason extraction	06 ICP & personas from won-deal conversations	07 Signal-stacked micro-campaigns	08 Closed-lost re-engagement
09 Tech-stack & job-posting signals to displacement	10 Support triage & first-draft answers	11 Voice-of-customer messaging & objection-driven content	12 Expansion signals & levers
13 Churn early-warning wired to escalation	14 AI coaching scorecards & roleplay on every call	15 Follow-up & deal assets in the buyer's own words	16 Conversation-evidence deal inspection & forecast validation
17 ICP-scored, person-level audiences for paid	18 Spend measurement: keyword ROI & incrementality	19 AI content & landing-page production with a quality bar	20 Multi-threading & ghost-stakeholder detection

The Minimum Stack

Reference architecture for the Top 20 use cases. Start with the first workflow and existing systems; buy additions only when an evidenced requirement justifies them.

TOOL	ROLE	UNLOCKS
Your CRM IN PLACE	The system of record. Every AI output lands in fields the team already works in.	FOUNDATION
Google Workspace or Microsoft 365 IN PLACE	Meeting transcripts, email and documents: call capture, the delivery surface and the document store.	FOUNDATION
GitHub	The version-controlled home for context, prompts and agent logic: review gates, history and rollback.	FOUNDATION
Claude/ChatGPT + Claude Code	Candidate reasoning and build tools for briefs, win/loss, messaging and content. Specify deployment and maintenance for each workflow.	02 05 06 10 11 15 18 19
Clay	One subscription for enrichment waterfalls, buying signals, job-change tracking and audience building.	01 04 07 08 09 17
Gong	Candidate conversation analysis and coaching platform. Test coverage and integration before adding to existing call capture.	03 14 16 20
PostHog	Candidate product analytics source. Reuse current usage data where sufficient; add instrumentation only for missing signals.	12 13

Run it like a product

- → **One accountable owner.** External engineering builds the first workflow. RevOps accepts maintenance only after documentation, monitoring and handover are tested.
- → **Review before use.** Define permitted data, account access and approval points. Keep customer messages and CRM opportunity changes under human control.
- → **Maintain the work.** Version prompts, logic and tests. Keep source evidence accessible with appropriate permissions; integrations still need maintenance when vendors change.

Limitations

- → **Budget, not a quotation.** Allow £40,000 in the example cost model for new tooling. Confirm licences, usage and existing contract overlap before committing.
- → **Buy against a requirement.** The vendor pages are a technical reference. They are not a requirement to purchase 27 categories or build all 20 use cases.
- → **Use current data first.** CS already holds usage and support history. Validate coverage before commissioning a new product-data pipeline.
- → **Review deployment needs.** Scheduled work requires controlled access, logs, error handling and a tested stop mechanism, regardless of vendor.
- → **Measure total effort.** Include checking, correction and maintenance time when assessing savings. Do not count draft speed alone as capacity.

AI GTM Tooling

The 27 core AI GTM tool categories, numbered in buy order: foundations gate everything above them. Acme has 01, 19 and 27 partially in place and nothing else.

01 SYSTEMS OF RECORD

Already owned: the question is what you connect to them

- **01 CRM / System of Record**
  The account, contact and opportunity record everything references
- **02 Forecasting & Revenue Intelligence**
  Pipeline visibility and deal inspection on CRM data

02 DATA & CONTEXT FOUNDATION

Buy first: gates everything above it

- **03 Data Warehouse & Transformation**
  Where GTM data can be joined and modelled
- **04 Data Pipeline: ETL & Reverse-ETL**
  Moves data in, pushes computed scores back out
- **05 GTM Context Layer**
  A structured, queryable definition of products, segments, personas and proof points
- **06 Retrieval & Memory for GTM Agents**
  Indexes calls, Slack, email and CRM so agents query relevant context at runtime
- **07 MCP Connectivity, Auth & Governance**
  Connects AI to your GTM stack, with permissions and tool-level access control
- **08 Agent Development SDK / CLI**
  GTM primitives for agent-built workflows

03 INTELLIGENCE: DATA & SIGNALS

Buy second

- **09 Contact & Company Data Enrichment**
  Firmographic, demographic and contact data to build and complete lists
- **10 Technographic & Active-Project Signals**
  Detects what a company runs and what it is actively building, including from job postings
- **11 Intent & ABM Platforms (legacy)**
  Third-party intent data and account-based advertising orchestration
- **12 Signal-Native Platforms (new guard)**
  Lighter, sales-workflow-native signal detection with natural-language custom signals
- **13 Website Visitor De-anonymisation**
  Identifies anonymous website traffic at company or person level
- **14 Job-Change & Relationship Intelligence**
  Tracks champion and buyer movement, and maps warm paths to target accounts

04 ORCHESTRATION

Buy third: where most operational value is created

- **15 Data Orchestration & Enrichment Workflow**
  Joins enrichment, scoring and activation into repeatable workflows
- **16 Agent Orchestration & Workflow Execution**
  Runs multi-step agent workflows on a schedule or trigger, with human gates

05 EXECUTION & ENGAGEMENT

Buy fourth

- **17 Sales Engagement & Sequencing**
  Multi-step outbound execution, delivery and reply handling
- **18 Dialers & Parallel Dialing**
  Multiplies live conversations per rep hour
- **19 Conversation Intelligence**
  Captures, transcribes and analyses calls, then acts on them
- **20 AI SDR / Digital GTM Workforce**
  Vendor-managed autonomous prospecting and outreach
- **21 Website Conversion & Inbound Agents**
  Replaces forms with conversation that qualifies and routes in real time
- **22 Direct Mail & Gifting Automation**
  Triggered physical sends as part of a play

06 REP SURFACE & PEOPLE

Buy last, and only once 02 to 05 exist

- **23 Rep AI Workspace / Command Centre**
  One surface that already knows the account and surfaces the next action
- **24 Answer-to-Action & Revenue Analytics Agents**
  Natural-language querying across GTM data that returns analysis and triggers action
- **25 Rep-Surface Extensions**
  Orchestration-layer power inside the tools reps already live in
- **26 Enablement, Coaching & Simulation**
  Scores calls, generates roleplays and personalises coaching at scale
- **27 General-Purpose AI & Agent Build Environments**
  The reasoning and generation layer, plus where most in-house GTM agents are built

Implemented well
Implemented, needs work
Not in place

AI GTM Tooling Vendors

Vendor guidance for a business of Acme's size with the Minimum Stack: the first name is today's suggestion, and the arrow points to the vendor at larger scale.

01 SYSTEMS OF RECORD

Already owned: the question is what you connect to them

- **01 CRM / System of Record**
  Your CRM
- **02 Forecasting & Revenue Intelligence**
  Build with Claude/ChatGPT → Clari

02 DATA & CONTEXT FOUNDATION

Buy first: gates everything above it

- **03 Data Warehouse & Transformation**
  Build with Claude/ChatGPT → Snowflake + dbt
- **04 Data Pipeline: ETL & Reverse-ETL**
  Build with Claude/ChatGPT → Fivetran + Hightouch
- **05 GTM Context Layer**
  Build with Claude/ChatGPT in GitHub
- **06 Retrieval & Memory for GTM Agents**
  Build with Claude/ChatGPT → Glean
- **07 MCP Connectivity, Auth & Governance**
  Build with Claude/ChatGPT → MintMCP
- **08 Agent Development SDK / CLI**
  Claude Code or Codex

03 INTELLIGENCE: DATA & SIGNALS

Buy second

- **09 Contact & Company Data Enrichment**
  Clay
- **10 Technographic & Active-Project Signals**
  TheirStack via Clay → Sumble
- **11 Intent & ABM Platforms (legacy)**
  No vendor recommended
- **12 Signal-Native Platforms (new guard)**
  Unify
- **13 Website Visitor De-anonymisation**
  Factors.ai → Vector
- **14 Job-Change & Relationship Intelligence**
  Clay

04 ORCHESTRATION

Buy third: where most operational value is created

- **15 Data Orchestration & Enrichment Workflow**
  Clay
- **16 Agent Orchestration & Workflow Execution**
  Claude Code or Codex

05 EXECUTION & ENGAGEMENT

Buy fourth

- **17 Sales Engagement & Sequencing**
  Gong Engage
- **18 Dialers & Parallel Dialing**
  Orum
- **19 Conversation Intelligence**
  Gong
- **20 AI SDR / Digital GTM Workforce**
  No vendor recommended
- **21 Website Conversion & Inbound Agents**
  Build with Claude/ChatGPT → Docket
- **22 Direct Mail & Gifting Automation**
  Sendoso

06 REP SURFACE & PEOPLE

Buy last, and only once 02 to 05 exist

- **23 Rep AI Workspace / Command Centre**
  Rox
- **24 Answer-to-Action & Revenue Analytics Agents**
  Build with Claude/ChatGPT
- **25 Rep-Surface Extensions**
  Build with Claude/ChatGPT
- **26 Enablement, Coaching & Simulation**
  Build with Claude/ChatGPT
- **27 General-Purpose AI & Agent Build Environments**
  Claude/ChatGPT + Claude Code

- In the Minimum Stack
- Strong value: buy next
- Potential value: buy on a trigger
- Low value: skip

From customer signal to commercial action

Worked example: expansion identification after the first seller workflow is proven. The account and evidence below are illustrative; no result is claimed.

What the workflow produces

Account	A064 · £60k current ARR · June renewal
Evidence	Usage report: +28% in 90 days. Contract: that use is already covered. Customer call: interest in regional talent planning.
Suggested next step	CS validates the outcome sought. VP Sales tests need, sponsor, scope, budget and timing for an additional module.
Commercial status	£24k sizing hypothesis. Unqualified, excluded from pipeline and forecast. No price proposal sent.

The useful judgement: more usage does not justify an automatic upsell. The possible opportunity is a new customer outcome beyond the current contract.

How it works in practice

1. Assemble evidence. Read permitted account, usage, contract and call records. Attach source links and dates to every finding; flag stale or contradictory evidence.

2. Validate with people. CS checks customer value and entitlement. The commercial owner confirms the buying case. AI suggests a review; it does not create a qualified opportunity.

3. Record the decision. Accept, revise or reject the suggestion with a reason. Missing budget or timing keeps it outside qualified pipeline. Do not send messages or change pricing automatically.

4. Improve and measure. RevOps retains reviewed examples to test later changes. Track checking time, unsupported claims, qualified opportunities and subsequent ARR. Functional leaders decide whether to extend use.

First compare against manual account reviews. Scale only after source accuracy, useful suggestions and total effort improve. Use approved access controls and human review throughout.

AI GTM Acceleration Implementation approach

Responsibilities for a consistent GTM operation. Acme's leaders own the decisions and outcomes, supported by external expertise where required.

07	**Strategy & operating model.** Connect the three-year growth case to priorities, capacity and investment.	CEO + GTM LEADERS
06	**Governance.** Set decision rights, data access, review standards and escalation.	ACME LEADERSHIP
05	**Leadership development.** Build the capability to lead the next stage and direct AI work.	CEO + FUNCTIONAL LEADERS
04	**Training & adoption.** Brief AI, supply context, review outputs and improve through feedback.	FUNCTIONAL LEADERS
03	**Process & playbooks.** Connect customer signals, handovers and expansion identification.	FUNCTIONAL LEADERS
02	**Customer context.** Maintain ICP, buying triggers, account evidence and outcome measures.	REVOPS + FUNCTIONAL LEADERS
01	**Technical delivery.** Connect data and build reusable AI workflows with external resource initially.	EXTERNAL GTM ENGINEER + REVOPS

05

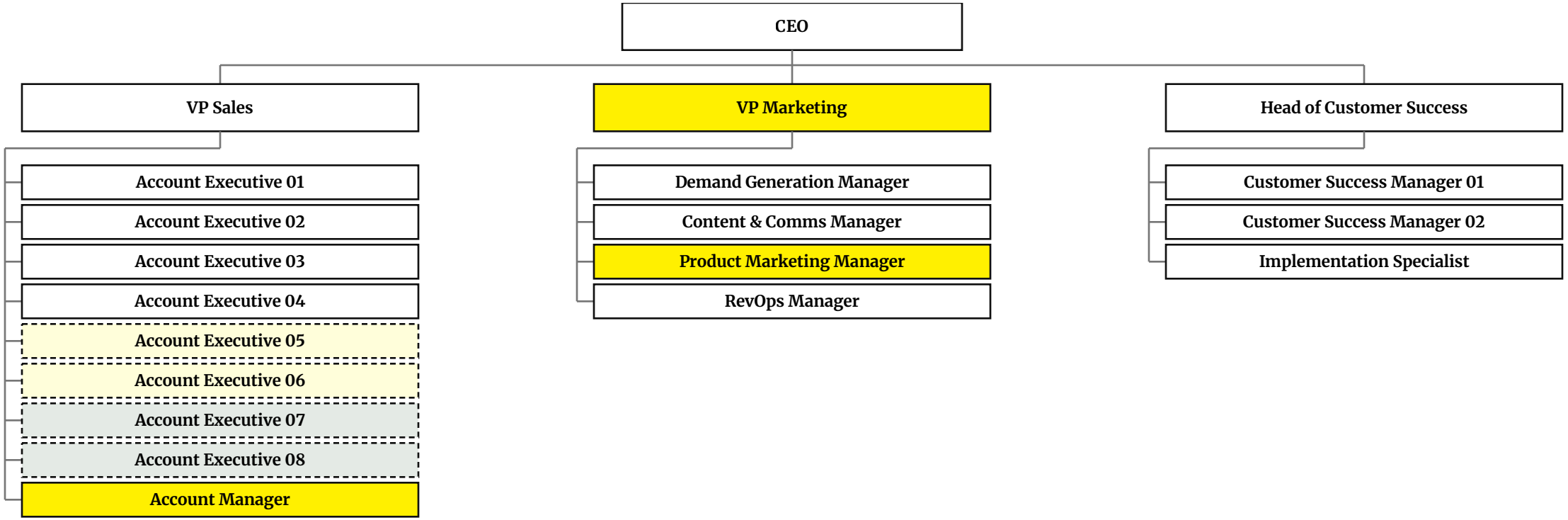
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GTM Organisation

The structure, leadership and investment the plan needs

Future GTM Organisation

Proposed organisation for the next 12 to 24 months. Likely growth hires are phased to support £14.50m ARR in 2028 and £20.31m in 2029.



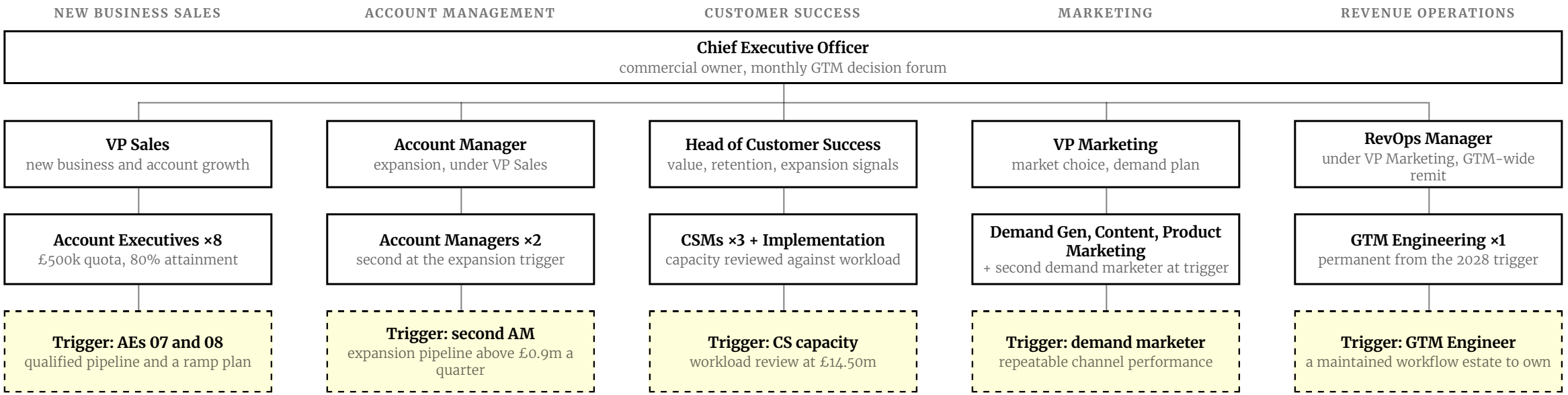
Priority hires: VP Marketing, Account Manager and Product Marketing Manager.
Role to remove: Head of Marketing, replaced by VP Marketing.
Likely growth hires: AEs 05 and 06 in the next 12 months, then AEs 07 and 08 in months 12 to 24.

Yellow: priority hire · White: retained
Cream, dashed: likely hire in next 12 months
Grey, dashed: likely hire in months 12 to 24

Head of CS retains service leadership, with development in customer value and expansion. Review additional CS capacity against workload. At £500k quota and 80% attainment, six AEs support £2.40m new-logo ARR, eight £3.20m. Hiring depends on pipeline, ramp and 120% NRR delivery. RevOps reports to VP Marketing. GTM engineering is initially external.

The future GTM organisational structure at scale

How the structure grows to £20.31m in 2029. Indicative and trigger-based: roles are added when pipeline, expansion or workload justifies them, and every addition is reviewed in the monthly forum before it is approved.



Triggers, not dates: AEs 07 and 08 follow qualified pipeline and ramp evidence, the second Account Manager follows expansion pipeline, and CS capacity follows workload at £14.50m.
Permanent GTM positions grow from 15 to 23 if every trigger fires, while ARR grows 2.7x. Productivity, not headcount, carries most of the plan: £400k of ARR per AE and 120% NRR.
At £500k quota and 80% attainment, six AEs support £2.40m of new-logo ARR against £2.07m required in 2028, and eight support £3.20m against £2.90m in 2029.
The CEO remains the commercial owner through the plan. The case for a Chief Revenue Officer is reviewed at £20.31m, when three functional leaders and eight sellers may justify the layer.
Assumes organic growth. An acquisition becomes an integration exercise run on the same operating model.

The future GTM organisational structure and operating model

The current organisation reflects how Acme grew: a sales function producing good results, a marketing team that executes, and a customer success team that delivers service reliably. Thirteen permanent GTM positions and the CEO. It is the right shape for £7m and the wrong shape for £20m, because nothing in it owns market choice, nothing owns customer growth, and the joins between functions are where the plan's assumptions fail. The proposed structure adds commercial ownership before it adds capacity.

Three priority hires and one role change. A VP Marketing replaces the Head of Marketing, with ownership of ICP focus, channel economics and the three-year demand plan, and with RevOps reporting in to give the function a GTM-wide view of data and performance. An Account Manager joins under VP Sales to own expansion qualification, progression and closing. A Product Marketing Manager turns buyer evidence into differentiation, proof and a stronger expansion case. Fifteen permanent GTM positions plus the CEO, net two more than today.

VP Sales owns new business and account growth with four AEs now, six by 2028 and eight by 2029, phased against pipeline evidence and ramp time. At £500k quota and 80% attainment, six AEs support £2.40m of new-logo ARR against the £2.07m the 2028 plan requires, and eight support £3.20m against £2.90m in 2029. The Head of CS retains service leadership with two CSMs and an Implementation Specialist, with development in customer value and expansion identification and a review of additional CS capacity against workload.

The future GTM organisational structure and operating model

No Chief Revenue Officer. At £7m to £14m ARR the CEO should remain the commercial owner, with a monthly GTM decision forum rather than another layer. The question of a CRO belongs at the 2029 review, when three functional leaders and eight sellers may justify one. Adding the layer now would absorb budget the plan needs for demand and sellers, and it would delay the leadership development the current team needs to run the next stage themselves.

The operating model changes more than the chart. Cross-functional new-business and expansion teams meet weekly against joint targets. A monthly forum reconciles demand, retention, expansion, capacity and cost, and records decisions. Customer ownership is defined at every stage from engagement to renewal. External GTM engineering builds the shared customer context and the first AI workflows, with RevOps developing the capability to maintain them. Leaders own the outcomes of AI work in their functions.

Sequencing. The first 90 days establish the ICP, the expansion approach, the leadership mandates and the operating rhythm with the current team, and launch the VP Marketing and Account Manager searches. Months four to twelve land the hires, confirm product marketing with the new leader, recruit the next two AEs and embed the recruited team in one rhythm. Years two and three phase capacity against triggers and review leadership scope, CS capacity and management spans at £14.50m and again at £20.31m.

The future GTM organisational structure and operating model

Actions

- → Approve the proposed structure and leadership mandates, and communicate them internally before recruitment begins so nobody learns their reporting line from a job advert.
- → Launch the VP Marketing and Account Manager searches with clear growth mandates, and set the Head of CS development priorities around customer value and commercial opportunity.
- → Confirm the RevOps reporting line under VP Marketing and its GTM-wide remit on the VP Marketing's arrival, so the incoming leaders join a working rhythm rather than build one.
- → Phase the next two AEs against qualified pipeline, ramp time and affordable hiring, and hold the year-three hires to the same triggers.
- → Review leadership scope, CS capacity and management spans against £14.50m ARR, and revisit the CRO question at £20.31m.

GTM Leadership Responsibilities and Ownership

COMMERCIAL OWNER

Chief Executive Officer

Owns the commercial result and the operating model: one growth plan, one forum, leaders accountable for the combined outcome.

- The 2027 to 2029 growth plan, committed to the board with pipeline, expansion, capacity and cost reconciled
- Leadership mandates and customer ownership across Sales, Marketing and CS
- The monthly GTM decision forum: demand, retention, expansion, capacity and cost in one review
- Recruitment of the VP Marketing and Account Manager, and the Head of CS development review
- Investment decisions: what to fund, revise or stop, including AI improvements and commercial capacity
- Board reporting from the same commercial view the leaders use

NEW SALES AND ACCOUNT GROWTH

VP Sales

Wins new customers and grows existing ones: new business and account management under one commercial leader.

- New-business ARR: £1.48m in 2027 at a 30% win rate, from £1.233m of qualified pipeline a quarter
- Quota and capacity: four AEs at £500k, phased to six and eight against pipeline evidence
- Account growth through the Account Manager, with a shared account review with CS
- Qualification, deal review and the forecast commitment
- Weekly cross-functional new-business and expansion teams with Marketing and CS
- Seller productivity from £340k toward £400k of ARR per AE, with customer-facing time measured

ACCOUNT MANAGEMENT · UNDER VP SALES

Account Manager, reporting to VP Sales

Grows revenue from existing customers: the plan's 56% expansion mix depends on it.

- Expansion ARR: £1.85m in 2027, toward 120% NRR
- Qualification, commercial progression and closing of expansion opportunities
- Expansion pipeline of £0.771m a quarter, converted at 60%
- Account plans for priority accounts, with future potential and unmet needs assessed
- Renewal commercials led with delivered-value evidence, in partnership with CS
- Pricing and packaging feedback to the CEO and product

GTM Leadership Responsibilities and Ownership

CUSTOMER SUCCESS

Head of Customer Success

Ensures every customer achieves the value they were sold, and surfaces the growth that follows.

- → Gross retention at 95% or better, with renewal risks identified early
- → Onboarding from the customer's reason for buying, not the contract
- → Customer value reviews and expansion identification, handed to the Account Manager
- → Service processes kept current and coached, with usage and support data maintained
- → Shared account review with Sales and the Account Manager
- → Development priorities in customer value and commercial opportunity, reviewed after 90 days

MARKETING

VP Marketing

Creates qualified pipeline from the chosen segments and keeps Acme's market understanding current.

- → Qualified new-business pipeline: £1.233m a quarter at acceptable acquisition cost
- → ICP focus, buying reasons and differentiation, reviewed monthly on customer evidence
- → Channel economics and the three-year demand plan
- → Product marketing: proof, positioning and the AI value story for an evolving buying committee
- → RevOps as a direct report, with a GTM-wide remit for data, customer context and reporting
- → GTM CAC ratio from 1.2x toward 1.0x

REVENUE OPERATIONS

RevOps Manager

Makes the business visible and the customer evidence usable: one set of definitions, one shared context.

- → Funnel definitions, conversion and velocity reporting, the same for acquisition and expansion
- → CRM data quality and the account history every leader reads
- → Shared customer context and the first AI workflows, built with external GTM engineering and maintained in-house
- → Baselines and measurement for AI work: time returned, quality, cost
- → The monthly forum's commercial view and the board pack prepared from it
- → The AI workflow inventory: owners, review standards and what to retire

OUTSIDE THE GTM ORGANISATION

Functions the GTM team depends on, with named owners elsewhere in the business.

Financial model and downside limits · **CFO**

Board oversight of the growth plan · **Chair**

Product roadmap and the AI features · **Product**

External GTM engineering · **Contracted, scope agreed with VP Marketing**

Data protection and security · **CFO with IT**

Expected budget implications of recommendations

05.3

Illustrative costing assumptions, not salary benchmarks or vendor quotations. Month 1 is January 2027 for this calculation only; rephase if action starts later. The existing VP Sales and Head of CS remain budgeted. Today's GTM cost base is £2.45m: £1.78m people including commission, £0.34m programmes, £0.11m tooling and data, and £0.22m travel and other. Of that, £2.18m is the commercial cost counted in the CAC ratio. The remainder is CS service delivery.

ROLE	START (PROPOSED)	SALARY ASSUMPTION	VARIABLE
VP Marketing	April 2027	£145,000 base	25% target bonus
Head of Marketing (released)	April 2027	£82,500 base released	No variable assumed in this scenario
Account Manager	April 2027	£67,500 base	50% of base at target
Product Marketing Manager	July 2027	£75,000 base	10% target bonus
Account Executives 05 and 06	July 2027, conditional	£72,500 base each	50/50 OTE; pipeline and ramp gates
Account Executives 07 and 08	Later, at trigger	Not in 2027 additions	Re-cost when approved
External GTM engineering	January to June	£7,500 per month	Six months, then review handover
Additional AI tooling	2027 allowance	£40,000	Confirm overlap with current £110k tooling
Leadership development	2027 allowance	£20,000	Includes RevOps handover support
Recruitment and transition	2027 allowance	£25,000	One-off planning provision

Employment loading is an illustrative 18% of base plus target variable, applied equally to hires and the released role. Net 2027 additions are £526,775, rounded to £527k. The annualised recurring addition after all listed hires is £735,550, excluding engineering and the one-off provision. No AI headcount saving is assumed.

Capital allocation Review

The proposed organisation and its costs are set out above. This section answers the next question: where the money goes, and in what order. It reviews current GTM spend function by function, shows what moves, and tests the result against the 1x CAC envelope the 2027 plan allows. One principle runs through it: fund commercial ownership and evidence before adding capacity. All figures in GBP, indicative and rounded.

Marketing · Programmes

Paid digital: £150,000. Hold the budget and test priority segments and buying reasons. Report qualified pipeline by cohort and follow it through to ARR. Review early evidence monthly, allowing for the 94-day median sales cycle.

Events and sponsorship: £80,000. Current attribution cannot establish return. Select events with relevant buyers, define account objectives and track subsequent conversations and opportunities before renewing commitments.

Content and agency: £70,000. Develop customer-backed proof and buyer answers, including AI value and data handling. The agency bridges until product marketing is in place. A further £40,000 for partner and customer programmes completes the £340,000 programme budget.

Marketing · People and AI capacity

Hire the VP Marketing first. Fund commercial ownership. The scenario includes nine months of the new role, less nine months of the released Head of Marketing cost.

Bound the engineering commitment. Cost six months at £7,500 a month. Extend only if measured results and a credible maintenance plan justify it.

Cost the change explicitly. The £40,000 tooling and £20,000 development allowances are counted once, under the common investment plan.

Net effect on cost

Programme spend remains £340,000. Its composition changes within that limit. Pipeline is evidence of potential return; only realised sales enter the ARR denominator of the cost ratio.

Capital allocation Review

SALES

Programmes

Sales tooling and enablement consolidate around the CRM and the shared customer context. Anything that does not connect to the account record is retired at renewal. Seller preparation and follow-up move to the first AI workflow, with customer-facing time per rep measured.

People

Do not hire ahead of the pipeline. The 2028 requirement is £2.07m of new-logo ARR, which six AEs at £500k and 80% cover. Recruit AEs 05 and 06 in 2027 only when qualified pipeline supports a ramped carrier, and hold 07 and 08 to the same test for 2029. Quota moves from £400k to £500k with the productivity support in place, not before.

Net effect on cost

The Account Manager is a priority hire. Two AEs are conditional additions costed from July for planning, with ramp ahead of 2028. Cost precedes their full output; hold the hires if demand and affordability do not support them.

CUSTOMER SUCCESS

Programmes

No new programme spend. Usage, support history and renewal dates are already the strongest data set in the business. The investment is the time to run customer value reviews and the shared account review, and the coaching that makes them commercial.

People

Develop, then review. The Head of CS retains service leadership with development in customer value and expansion identification, reviewed after 90 days. Two CSMs and the Implementation Specialist stay. Additional CS capacity is reviewed against workload as the base grows toward £14.50m, not added in advance.

Net effect on cost

No additional permanent CS capacity is funded in this scenario. Review workload as value reviews increase. Development is in the common allowance; protect service quality and retention as commercial activity grows.

REVENUE OPERATIONS

Programmes

Engineering is £45,000 for six months and new tooling is £40,000 for 2027. Both appear once in the common cost bridge. RevOps maintains one set of commercial definitions and checks existing licences before any purchase.

People

The RevOps Manager is in seat and moves under the VP Marketing with a GTM-wide remit. The role grows from reporting support to the owner of customer context, baselines and the workflow inventory. Development comes with the contracted engineering, which hands over maintenance before it exits.

Net effect on cost

The existing RevOps role remains in the base. Accept workflow maintenance only after a tested handover. An extra six months of engineering would cost £45,000 and requires a new decision.

Capital allocation Review

Impact in 2027, against the 1x CAC envelope

2027 incremental cost, including target variable and 18% employment loading. Rounded to nearest £1k; total uses unrounded amounts.

VP Marketing less released role, 9 months	£87k
Account Manager, 9 months	£90k
Product Marketing Manager, 6 months	£49k
Two AEs, 6 months, conditional	£171k
Engineering, 6 months	£45k
New tooling + leadership development	£60k
Recruitment and transition, one-off	£25k
2027 additions; programmes unchanged	**£527k**

Commercial cost bridge, before any uncosted inflation or other changes:

Existing commercial cost	£2.180m
Plus 2027 additions	£0.527m
Illustrative 2027 commercial cost	**£2.707m**
Allowed at 1x on £3.330m ARR sold	£3.330m
Remaining headroom if the plan lands	**£0.623m**

The standing model and the sensitivities

Hold target compensation in these stress tests. Reforecast commission, timing and all other costs before approving the budget.

Planned £3.33m sales; £2.707m cost	0.81x GTM CAC
Sales stay at £1.82m; same cost	1.49x GTM CAC
Engineering extended by six months	£45k additional cost
NRR stays at 103%; new-logo target	£2.74m; seven productive AEs
All listed hires, annualised additions	£736k recurring, post-handover
2027 operating breakeven	**Requires a full P&L check**

06

[2026 CONFIDENTIAL REPORT]

Actions

Our recommendations on what to do and when

Board-Level Priorities

NOW

1. Sharpen the ICP and shorten the learning cycle. Define why the best customers buy, what they are trying to change and how their markets are moving. Use conversations and win/loss evidence to update targeting and differentiation, going beyond firmographic profiles.

2. Establish a deliberate customer expansion strategy. Build towards 120% NRR by assessing accounts for future potential and unmet needs, with a commercial owner for growth. Align pricing, product development and customer engagement around the outcomes that make further investment worthwhile.

3. Hire for demand growth and commercial ownership. Start the VP Marketing and Account Manager searches with clear growth mandates. Establish cross-functional new-business and expansion teams, meeting weekly against joint targets and a shared approach to identifying, developing and closing opportunities.

→

NEXT

1. Equip the incoming leaders to change performance. Give the VP Marketing ownership of market choices and demand investment, with account management under VP Sales. Develop CS leadership in customer value and commercial opportunity, and confirm product marketing needs with the new leader.

2. Roll out the revised acquisition and expansion approach. Refine channel investment and pursue the strongest opportunities in existing accounts. Review early changes in qualified pipeline, conversion and GTM cost before judging whether the approach can scale.

3. Return time to customer-facing work. Use external GTM engineering to replace isolated builds with maintained customer context and repeatable AI workflows. Remove preparation and administration that add little value, while coaching leaders and RevOps to review quality, improve the work and measure time returned to customers.

→

LATER

1. Scale demand investment where the evidence supports it. Increase spend in the segments and channels that consistently produce qualified opportunities at acceptable cost. Phase additional sellers against pipeline and ramp time, adjusting headcount when customer growth or measured productivity changes the requirement.

2. Make expansion a dependable source of growth. Extend the account-growth approach where customer outcomes and qualified opportunities support it. Use the resulting evidence to evolve pricing, packaging and product priorities, while protecting retention and tracking progress towards 120% NRR.

3. Adapt leadership and capacity for years two and three. Review management spans, CS workload and commercial ownership against £14.50m and then £20.31m ARR. Add capability where demand and customer needs justify it, and include demonstrated AI capacity gains in the hiring and profit plans.

AI GTM Acceleration Roadmap

The first workflows should improve seller preparation and expansion identification. Scale them only when quality and commercial impact are measured.

01 FOUNDATIONS AND INITIAL USE CASES

USE CASES

- → **Customer signal capture.** Connect calls, transcripts and emails to account history, buying triggers and expansion signals.
- → **Seller preparation.** Use shared context to reduce research and administration, with seller review and customer-facing time measured.

GTM STRATEGY

- → **Focus the ICP.** Use buyer evidence to refine priority segments, outbound selection and the reasons customers act.

ENGINE

- → **Build shared foundations.** Give external GTM engineering a limited brief covering common context, reliable data and reusable workflows.

PEOPLE

- → **Put ownership and review in place.** External GTM engineering builds the foundations and develops RevOps capability. Leaders own outcomes and learn to brief, review and improve AI work.

First 90 days: common context, initial workflows, named owners and baselines in use.

02 SCALE WHAT WORKS

USE CASES

- → **Expansion identification.** Use customer, product and service signals to surface account opportunities for Sales and CS to assess.
- → **Extend proven seller support.** Scale preparation and follow-up where quality improves and time is returned to customer-facing work.

GTM STRATEGY

- → **Refine the commercial response.** Feed buying signals and results into positioning, channel choices and the value case for AI features.

ENGINE

- → **Scale measured improvements.** Compare pipeline, conversion, time and errors with the baseline. Retire duplicate builds and maintain the shared context.

PEOPLE

- → **Manage adoption and capacity.** Coach leaders on AI work management. Redeploy capacity when evidenced and reflect it in the funded growth plan.

Scale when quality and commercial results justify it. Reflect released capacity in the plan.

GTM action plan: Horizon 1

Achievable in the next 90 days with the current team supplemented by external resource. Each commitment produces an operating change the board can review.

COMPLETE BY		STRATEGIC COMMITMENT	ACCOUNTABLE
Month 1	01	Use customer conversations and win/loss evidence to refine the priority ICP, buying reasons and differentiation. Establish a routine for updating those choices as evidence changes.	**Head of Marketing**
	02	Assess priority accounts for future potential and unmet needs. Set the expansion approach across customer engagement, pricing and product, with a commercial owner for each credible opportunity.	**VP Sales**
	03	Launch the VP Marketing and Account Manager searches with clear growth mandates. Set the Head of CS development priorities around customer value and commercial opportunity.	**CEO**
Month 2	04	Put cross-functional new-business and expansion teams into a weekly rhythm. Agree joint targets, customer ownership and the handovers from engagement through to commercial decisions.	**CEO**
	05	Reconcile the 2027 to 2029 plan with pipeline creation, 120% NRR, quota capacity and GTM cost. Separate current performance from assumptions that still need to be demonstrated.	**CFO**
	06	Use external GTM engineering to establish shared customer context and an initial workflow that removes low-value preparation or administration. Develop RevOps ownership and measure customer-facing time released.	**RevOps Manager**
Month 3	07	Review early results from focused demand investment and account development. Reallocate effort using qualified pipeline, conversion and customer evidence, without treating an early improvement as proof of scale.	**Head of Marketing**
	08	Review the acquisition and expansion gaps against the growth plan. Decide what to fund, revise or stop, including leadership support, commercial capacity and the next AI improvements.	**CEO**

Month 1 starts when Acme chooses to act. 120% NRR is a 2027 plan target, not a promised 90-day result. Leadership recruitment may take three to four months.

Horizon 2

Requiring recruitment.

1. Recruit the VP Marketing to own ICP focus, channel economics and the three-year demand plan.
   Accountable: CEO · **Dependency:** Approved mandate and funded role
2. Recruit an Account Manager under VP Sales, with expansion ownership and a shared account review with CS.
   Accountable: VP Sales · **Dependency:** Funded role and agreed customer ownership
3. Confirm and recruit product marketing capability to turn buyer evidence into differentiation, proof and a stronger expansion case.
   Accountable: VP Marketing · **Dependency:** Commercial remit and budget agreed
4. Put RevOps under VP Marketing with a GTM-wide mandate for data, customer context and performance reporting.
   Accountable: CEO · **Dependency:** VP Marketing in post and decision rights agreed
5. Secure external GTM engineering capacity and agree who maintains the shared AI workflows after delivery.
   Accountable: VP Marketing · **Dependency:** RevOps remit and funded engineering scope
6. Recruit two additional AEs early enough to ramp for the year-two requirement. Prioritise proven segments and qualified demand.
   Accountable: VP Sales · **Dependency:** Pipeline evidence, ramp plan and affordable hiring
7. Develop the functional leaders against the demands of a £14.50m to £20.31m business. Review the Head of CS against the agreed commercial development milestones.
   Accountable: CEO · **Dependency:** Leadership assessment and development priorities
8. Embed weekly cross-functional new-business and expansion reviews, with joint targets and shared customer decisions.
   Accountable: CEO · **Dependency:** Leaders in post and common performance measures

No calendar deadlines. Progress depends on recruitment, capacity and the evidence needed for each investment decision.

Horizon 3

Strategic evolution.

1. Scale the channels that create qualified demand in the chosen ICP. Increase investment against conversion and acquisition economics.
   Accountable: VP Marketing · **Dependency:** Repeatable channel performance
2. Revisit the ICP and buying triggers as customer needs change. Use sales and customer evidence to revise the market focus.
   Accountable: VP Marketing · **Dependency:** Consistent customer signal review
3. Scale account growth around future potential and unmet needs, connecting customer outcomes to pricing and product priorities.
   Accountable: VP Sales · **Dependency:** Account ownership and reliable opportunity data
4. Evolve pricing and packaging around demonstrated value, including AI, while protecting retention and gross margin.
   Accountable: CEO · **Dependency:** Buyer evidence and delivery-cost case
5. Set and deliver the 2028 and 2029 profit trajectory. Reconcile demand investment, recruitment and customer growth in one model.
   Accountable: CFO · **Dependency:** Funded commercial model and downside limits
6. Phase the next two AE hires for year three. Adjust the requirement if expansion or measured productivity improves.
   Accountable: VP Sales · **Dependency:** Demand, ramp time and profit headroom
7. Review leadership scope, CS capacity and management spans as the company scales. Add capability where the workload and economics justify it.
   Accountable: CEO · **Dependency:** Capacity evidence and leadership review
8. Extend maintained AI workflows that improve quality and return time to customers. Retire ineffective builds and use measured capacity gains in resourcing decisions.
   Accountable: VP Marketing · **Dependency:** Measured outcomes and accountable workflow owners

[ABOUT DEMAND KARMA]

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