[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.

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.

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.

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.

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.

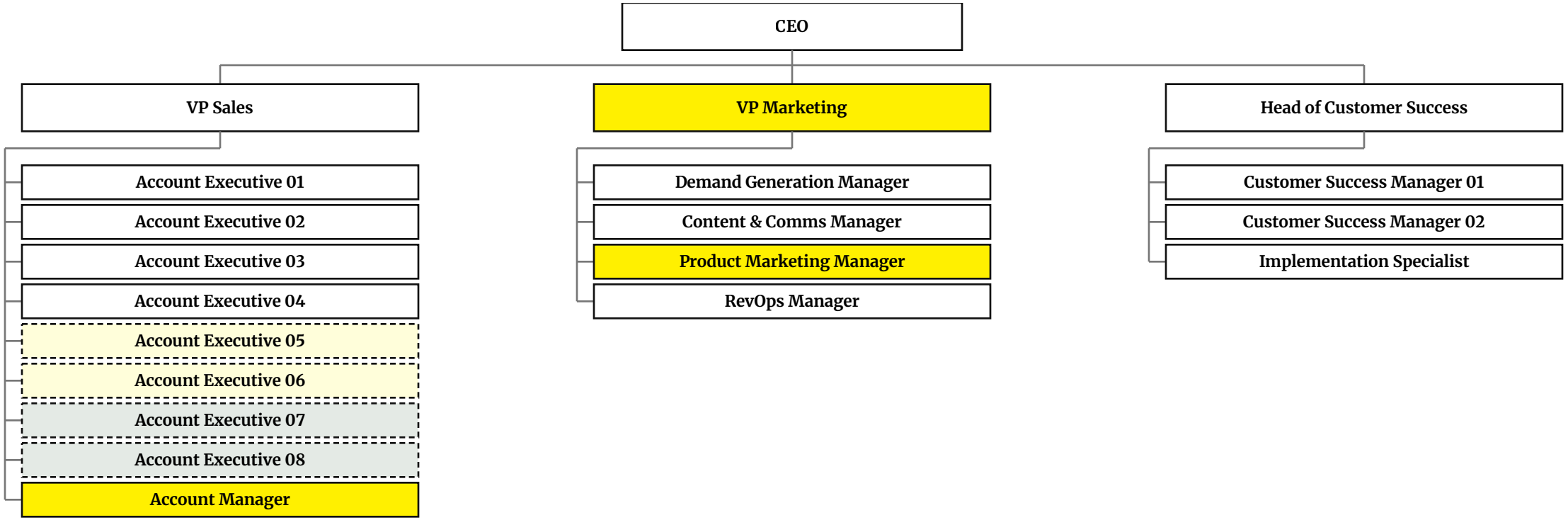
GTM Operating Rhythm

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.

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.

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]

Win the next decade

AI-era GTM Operating Partners

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Edwin Abl
Co-founder · Silicon Valley

GTM Operating Partner at Mercia Ventures, now embedded in Valley AI-native go-to-market. Former CMO at Modulr. Led marketing, alliances and GTM for Appirio in Europe before its $500m acquisition by Wipro.

Josh Morse
Co-founder · London

Former CRO and CMO of investor-backed businesses. Experience scaling GTM from $3m to $50m+ across Sales, Marketing, Sales Development, Partnerships and RevOps, with multiple successful exits.