UpScale Solutions:
Turning a big vision into a clear GTM strategy

UpScale Solutions exists to free ambitious Australian organisations from software that holds them back. They help businesses move faster, make better decisions, and grow with confidence.

Driven by a mission to unlock organisational potential, UpScale Solutions provides Melbourne-based expertise in business systems and custom software. The team solves client's unique problems by transitioning their processes into a single, intelligent AI-integrated system.

UpScale's proprietary methodology allows SMEs to gain access to the type of custom systems that would otherwise not be available to smaller operators with traditional custom builds.

UpScale's vision is BIG: a future where an AI-enabled delivery model compresses the time it takes to design, scope, and build custom software. Imagine a chatbot capturing end-user requirements, collaborating with stakeholders to refine them, producing a detailed scope, and then generating the application itself.

But speed alone isn't the point. While "vibe coding" and agentic AI are optimised for getting something working now, UpScale is building systems that last, keeping clients in control. They own the software (not rent it via software-as-a-service [SaaS]), permissions are intentional, and decisions are preserved in a decision trail that supports upgrades and expansion with ease and safety as business needs change.

UpScale had the ingredients: a BIG vision and serious technical depth. But after 18 months and early client wins, the next phase of growth needed focus. The leadership team knew they had to tighten their go-to-market strategy: define the ideal customer, lead with the most profitable problem, refine the offer, and commit to a clear sales and marketing approach.

Faced with this need, it made sense for the UpScale executive team to seek a partner with deep domain expertise in GTM strategy and an aligned philosophy on the opportunity that technology and process bring. Enter align.me, with the Funnel Camp GTM planning workshop and accompanying Funnel Plan, AI-enabled go-to-market planning platform.

Snapshot:

Founded:
2024

Industry:
Software development

Size:
11

Key Challenge:
GTM alignment, holding to the plan, breadth and depth of marketing execution support.



The challenge

Despite having a capable team and early traction, UpScale's leadership team found themselves juggling multiple priorities without a clear roadmap for growth.

The key challenges they faced included:

Lack of clarity around target customers:
While they knew they could solve real problems for a variety of organisations, aligning on the ideal customer segments and understanding how to approach them was unclear.

Defining the problems they were solving:
With a broad range of potential use cases, the team needed to clearly articulate the specific problems their solutions would solve for the market.

Aligning stakeholders:
Key decision-makers and team members needed a shared space to align on vision, strategy, and execution priorities.

Understanding how to engage the market:
Knowing which channels to use to speak to potential clients and get their foot in the door required a structured approach that the team hadn't yet developed.

Hyper-accelerating demand:
Despite enormous in-house capability, UpScale needed a clear strategy to fast-track interest and traction in the market.

The turning point

The leadership team didn't just want someone to guide discussions; they needed a partner who could provide expert B2B input, test assumptions, and offer actionable sales and marketing insights to accelerate growth.

The breakthrough for UpScale came when they were referred to align.me through a trusted connection and engaged the team to participate in Funnel Camp™, align.me's structured, high-impact planning workshop for B2B organisations. Funnel Camp™ is designed to align teams, validate go-to-market strategy, and build a 3-year execution plan that drives growth. To date, more than 600 B2B growth businesses from 48 countries have participated, achieving on average a doubling of pipeline after 12 months.

For UpScale, the workshop - combined with the step-by-step guidance of the Funnel Plan software - was the catalyst for turning ideas into a clear, actionable plan.

The Funnel Plan software wasn't just the tool used by the align.me consultant to facilitate the planning process - it delivered the internal team capability to become the backbone of their planning process. Gideon and the team didn't stop at using it to record discussions from Funnel Camp™; they used it to:

- Ideate various campaign opportunities
- Build project briefs for those tasks that made sense to outsource
- Prioritise task owners and delivery dates
- Capture the long list of execution tasks
- Refine resourcing (people and budgets) necessary to implement the plan

> "I often go back to our list of problems in Funnel Plan when I'm creating content or reviewing campaigns. It's like a cheat sheet for what matters most to our customers."
>
> - **Gideon Cordover,** Chief Marketing Officer



The workshops created space for deep discussion, pushing leaders to work through and align on key elements, and answer fundamental questions of their Go-To-Market strategy:

- What do we want to achieve together?
- What problems do we solve for the market?
- Which companies or groups are we aiming to target?
- How do we plan on reaching the customer?
- How many names, leads, opportunities, proposals, and sales do we need every month?
- What are our tactics to move buyers?

> "Having a marketing expert who knows B2B, who's done this all before, and is across both sales & marketing, was a key value add. We needed that person to facilitate it through the lens of an expert, test some of our assumptions, and steer us in the right direction".
>
> - **Gideon Cordover,** Chief Marketing Officer

The result

For UpScale Solutions, the outcomes of the Funnel Camp™ process and supporting Funnel Plan software were both immediate and enduring. The combination didn't just produce a plan on paper - it created true alignment across the leadership team and gave structure to the company's next phase of growth.

1. Clear alignment and focus
2. Sharper go-to-market direction
3. Funnel Plan became the single source of truth for their GTM strategy
4. Teamwide ownership of strategy
5. Built execution momentum

What set the process apart for UpScale was the way Funnel Plan combined strategic theory with executional discipline. Rather than walking away with static documents, the team left with a living, digital plan - a single platform where strategy, metrics, and ownership came together.

> "We all left the room with the mindset that we're all paddling in the right direction. Having the plan on a page that we could point to gave everyone clarity on what success looked like and how we'd get there."
>
> - **Gideon Cordover,** Chief Marketing Officer

Looking ahead:

Having built a solid go-to-market plan through Funnel Camp™, UpScale initially set out to execute the strategy internally. However, it soon became clear that while the plan provided clarity and direction, the pace of execution was limited by their internal capacity.

Rather than slow their momentum, UpScale made the strategic decision to bring align.me back on board - this time to lead the execution in 2026 and beyond.

Funnel Plan continues to guide align.me's execution, and we look forward to sharing the quantifiable business outcomes of the executed GTM plan over the next 12-months.

To find out more about how align.me can help you grow your sales and marketing and deliver better support, experise and outcomes, contact the team today.

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