[COMPANY NAME] – REVENUE GROWTH PLAN – VP SALES

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EXECUTIVE SUMMARY

This document outlines a comprehensive three-year go-to-market plan to achieve two primary objectives: first, to transform [Company Name]'s revenue composition from its current xx% SaaS base to a target of xx%; and second, to scale the business to a £10M revenue run rate by the end of FY27. The mission is ambitious but achievable, backed by a £xxM Series A investment and a clear market opportunity.

The core of this plan is a "SaaS-Led with Strategic Services" strategy. Our primary focus will be selling the high-margin [Company Name] SaaS platform, while strategically leveraging [Company Name]'s agency expertise as a key differentiator and revenue accelerator. This approach addresses the most critical challenge facing the business: a significant pipeline deficit.

To execute this, we will immediately build a high-performance sales organisation. The plan begins by promoting the two experienced Senior BDRs to Account Executive roles and hiring a world-class team of four SDRs. This initial team will be built on a MEDDPICC-native culture, using the methodology as the core operating system for rigorous qualification and forecasting.

The financial model projects growth to £3.4M in Year 1, £5.5M in Year 2, and £10M in Year 3. This is fuelled by a proposed Year 1 GTM budget of approximately £980k, which covers the necessary investment in top-tier talent and technology.

This is not just a growth plan; it is a blueprint for a strategic transformation. It details the people, processes, and strategy required to build a predictable, scalable, and efficient revenue engine that will establish [Company Name] as a market leader.

STRATEGIC FRAMEWORK & MASTER ASSUMPTIONS

This section outlines the foundational pillars of the GTM plan. It begins with the core strategic themes that guide our decisions, followed by the master operating assumptions that underpin the financial and headcount model.

Key Strategic Themes

These five themes are the guiding principles for every aspect of the proposed sales transformation and growth plan.

1. **Execute a SaaS-Led Transformation:** The central mission is to transform the company's revenue composition from its current 91% agency / 9% SaaS split to a target of 80% SaaS revenue within three years.
2. **Invest in Top-Tier Talent:** The plan is predicated on hiring and retaining "pro" level talent. This is reflected in the commitment to strong compensation packages and providing clear career paths.
3. **Build a MEDDPICC-Native Culture:** MEDDPICC will be the core operating system for the sales organisation, embedded from day one of onboarding to ensure rigorous qualification and process discipline.
4. **Drive Data-Driven Execution:** Every decision will be grounded in data. We will leverage the modern tech stack to track key metrics and hold ourselves accountable to the venture-backed standards of capital efficiency.
5. **Lead with Pragmatic Change:** We will make **bold decisions** where necessary and make them **early**. However, we will always remain flexible to adapt to new data, fostering a culture of continuous improvement, not constant, disruptive change.

Master Operating Assumptions

The following table contains the definitive assumptions that form the basis for the financial model, hiring plan, and quota-setting in this document.

Category	Assumption	Detail / Source
Financials	Current Revenue	£2.7M (split £2.45M Agency / £250k SaaS)
	Target Revenue Mix	80% SaaS / 20% Agency
	Financial Year	August 1st – July 31st
	[Company Name] ACV Tiers	Self-Serve: £3k | Mid-Market: £30k | Enterprise: £120k
	GTM Budget	To be designed and proposed within this plan.
Sales Team & Roles	Initial Team	2 newly promoted AEs, 2 newly hired AEs, 1 new Senior ADR, 3 new Graduate SDRs.
	AE Responsibilities	Close MM/Ent deals, own expansion, self-source 30% of leads.
	SDR Responsibilities	Drive outbound pipeline for the Self-Serve and Mid-Market tiers.
Performance Metrics	Pipeline Conversion	Modelled at 30% SQL-to-SAL and 35% SAL-to-Win.

	Quota Overassignment	The total AE quota will be 120% of the company's new business target – for redundancy
	CAC Payback Targets	6 months for the SDR-led motion; 2-3 months for Agency deals.
	Current Pipeline	Extremely low at ~5 MQLs/SQLs per month.

THE STRATEGIC PLANNING PROCESS

This section outlines the rigorous methodology used to develop this plan, ensuring the final recommendation is based on a systematic analysis of the situation and strategic options.

Defining The Mission & Objectives

The first step was to define the core mission based on the interview task. The primary objective is to scale the business to £10M in revenue within three years. This is coupled with the critical secondary objectives of building a high-performing sales team, establishing a scalable GTM process, and embedding the MEDDPICC framework into the team's DNA.

Therefore, the mission for this plan is defined as:

To create a credible, data-driven plan to transform the company's revenue mix and scale to £10M by August 2028. The plan must detail a clear vision for GTM strategy, team build-out, and the operationalization of the MEDDPICC sales methodology.

Situation Analysis

The next step was a deep analysis of the internal and external environment. The key findings that shaped this plan are:

- **A Transformational Imperative:** The current revenue mix is approximately 91% agency services to 9% SaaS. Achieving the board's goal of an 80% SaaS mix requires a fundamental business transformation, not just incremental growth.
- **Strong Investor Backing:** The recent £xxM Series A funding from [Investor Name] is explicitly "go-to-market fuel" to scale the [Company Name] SaaS platform, validating the strategic priority.
- **A Powerful, Differentiated Product:** [Company Name] is uniquely positioned in a crowded market as a ["USP"] rather than just a ["Generic Industry Messaging”], with a compelling xx% forecast accuracy claim.
- **Significant Market Tailwinds:** The business is perfectly positioned to capitalize on major market shifts, including the rise of AI in marketing and the need for new measurement solutions in a "cookieless world".
- **A Major Pipeline Gap:** The current inbound lead flow of ~5 MQLs/SQLs per month is insufficient to fuel the required growth, making the creation of a powerful outbound sales engine the top operational priority.

Analysis of Strategic Options

Based on the situation analysis, three high-level strategic options were considered to achieve the mission:

1. **SaaS-First:** A pure-play strategy focused exclusively on selling the [Company Name] platform.
2. **Agency-First:** A strategy to lead with services to maximize short-term revenue and cash flow.
3. **Hybrid/Segmented:** A dual-motion strategy selling both offerings in parallel.

These options were evaluated against critical criteria, including scalability, alignment with investor goals, and execution risk.

Recommended Strategy

The analysis concluded that a pure strategy was suboptimal. The recommended course of action, which forms the basis for this entire plan, is a nuanced hybrid model: ***The "SaaS-Led with Strategic Services" Model***

This strategy prioritizes the sale of the [Company Name] SaaS platform in every engagement. However, it strategically leverages [Company Name]'s agency services as paid, add-on packages to increase deal value, accelerate customer success, and create a powerful competitive differentiator. It provides the focus and scalability of a SaaS-first approach with the practical advantages of the hybrid model.

PART 1: STRATEGIC VISION & GO-TO-MARKET PLAN

This section outlines the three-year strategic vision for [Company Name] and [Company Name]. It begins with the top-level operating plan and financial targets, then details the go-to-market (GTM) strategy, target customer segments, and competitive positioning required to achieve our mission.

The 3-Year Operating Plan

This plan models an aggressive but achievable transformation, pivoting the business to a SaaS-dominant revenue mix whilst achieving significant overall growth. The model accounts for SaaS churn and a managed decline in standalone agency revenue.

Fiscal Year	Theme	Start Revenue	SaaS Churn (10%)	Agency Decline (30%-20%)	New ARR Target	End Revenue
Y1 / FY25 (Sept '25 - Jul '26)	Foundation & Transformation	£2.7M	(£25k)	(£735k)	£1.45M	£3.4M
Y2 / FY26 (Aug '26 - Jul '27)	Execution & Acceleration	£3.4M	(£167k)	(£343k)	£2.6M	£5.5M
Y3 / FY27 (Aug '27 - Jul '28)	Scale & Dominance	£5.5M	(£350k)	(£274k)	£5.1M	£10M

Go-to-Market (GTM) Strategy: The "SaaS-Led with Strategic Services" Model

Our GTM motion is built on a single, clear principle: we lead with the value of the [Company Name] SaaS platform in every conversation. The primary goal of the sales team is to sell recurring software licences, a strategy underpinned by a Value Pricing approach. The cost of the software will be directly linked to the tangible ROI and business outcomes we identify and quantify during the MEDDPICC process.

To complement our technology, [Company Name]'s agency services are strategically utilised as paid, add-on professional service packages. These packages serve three key functions: they increase the total deal value (ACV), de-risk the investment for clients who lack internal resources, and accelerate their time-to-value, which drives adoption and improves long-term retention. This unique ability to attach expert services leverages the company's "agency-native DNA" as a powerful competitive differentiator.

Guiding AI Principles

As an AI-native company, our entire GTM approach is guided by a clear set of principles:

- **AI to Empower, Not Replace:** We use AI to augment the intelligence of our customers, giving them the data to make better decisions, faster.
- **Ethical & Transparent Data:** We are committed to the ethical use of data and providing transparency in how our models work to build trust with our customers.

Ideal Customer Profile (ICP) & Segmentation

Our GTM strategy will focus on two core, tested ICPs in Year 1, before expanding into new segments in Years 2 and 3.

Year 1 Core Segments:

- **ICP 1 (Agencies):** UK-based Google Premier Partner agencies with over 30 staff. Their key pains are the operational inefficiency of manual client reporting and the need for a strategic differentiator to win new business.

- **ICP 2 (Retailers):** E-commerce brands with over £30M in revenue and £50k+/month in marketing spend. Their primary pains are resource constraints, budget accountability to the C-suite, and the risk of wasted ad spend.

- **ICP 3 (Exploratory – "One-to-Many"):** Private Equity and Venture Capital firms with a portfolio of e-commerce or B2B SaaS companies. A single sale to the investment firm could lead to a rollout across their entire portfolio, representing a highly efficient growth channel.

Year 2/3 Expansion Segments:

- **Geographic Expansion**: We will begin targeting the same core ICPs within the US market, laying the groundwork in late Year 2 for a full launch in Year 3.

- **Vertical Expansion**: Based on the platform's capabilities, we will explore expansion into other data-rich verticals such as B2B SaaS and Financial Services.

Competitive Positioning & Differentiation

In a crowded MarTech landscape, our positioning must be sharp and clear. We do not compete as a simple data tool; we compete as a strategic partner.

Positioning Statement: [Company Name] is the AI-powered decision engine for modern marketers, moving beyond simple data reporting to provide actionable, predictive insights for budget optimisation and competitive advantage.

Key Differentiators:

- **The ["USP"]**: Unlike ["Generic Industry Messaging”] like [Competitor Names], our core value is not just aggregating data, but telling you what to *do* with it.

- **The Synergistic Model**: Our ability to attach expert agency services gives us a unique advantage that pure-play SaaS competitors cannot match.

- **Practitioner Credibility**: The platform's origin within the [Company Name] agency provides ["USP"] that resonates powerfully with our core agency ICP.

Strategic Partnerships Strategy

To accelerate growth and expand our ecosystem, the VP of Sales will personally lead partnership initiatives in the first three years, with a dedicated Partnerships Manager planned to be hired in Year 4.

Phase 1 (Year 1-3):

- **Technology Partnerships:** We will actively seek integrations with complementary, non-competitive technologies in the MarTech and e-commerce space (e.g., CRO platforms, email service providers) to create a more holistic solution for our clients.

- **Referral Partnerships:** We will build a formal referral programme to incentivise VCs, e-commerce consultants, and non-competing agencies to provide qualified introductions.

Key GTM Initiatives & Marketing Alignment

To generate the required pipeline, the sales team will work in close partnership with Marketing on several key initiatives:

- **Targeted C-Suite Events:** We will co-host exclusive roundtable dinners for CFOs and CMOs at major industry events like ShopTalk, focusing on the theme of "Marketing Spend Efficiency & ROI".
- **The ["USP"] Campaign:** We will run targeted campaigns at our agency ICP, positioning the [Company Name] platform as a tool that elevates them from a service provider to a strategic forecasting partner for their clients.
- **Weaponise the xx% Accuracy Claim:** We will work with marketing to create a cornerstone content asset (e.g., a detailed whitepaper or webinar) that explains the methodology behind our forecasting accuracy. This will be a powerful lead generation tool to attract sophisticated buyers.

PART 2: GTM BUILD-OUT: TEAM & ENABLEMENT

This section details the plan to build a world-class, high-performance sales organisation. The structure is based on a "Land and Expand" model, where Account Executives are responsible for the entire commercial relationship, from acquisition to expansion.

The 3-Year Headcount & Org Chart Plan

Our hiring plan is designed to scale capacity just ahead of revenue expectations, with a clear career path from SDR to AE to Senior AE.

End of Fiscal Year	Role	Y1 (July '26)	Y2 (July '27)	Y3 (July '28)
Leadership	VP of Sales	1	1	1
	SDR Team Lead	0	0	1 (Promotion)
Closing	Senior Account Executive	0	2 (1 promo, 1 hire)	4
	Account Executive	4	5	9
Pipeline Gen	Senior ADR	1	1	0 (Promoted)
	Graduate SDRs	3	6	12
Total Headcount		**9**	**15**	**27**

Note: Year 4 would see the hiring of the first US-based AEs and a dedicated Partnerships Manager.

Onboarding & Ramp

A structured onboarding programme is critical to minimise ramp time and embed our MEDDPICC culture from day one.

The 90-Day SDR & ADR Onboarding Plan

This plan is designed for the incoming graduate SDRs, with the Senior ADR participating and then co-leading the training for their cohort.

- **Days 1-30 (Immersion & Certification):** Focus is on knowledge absorption. This includes deep dives into the company, the ICPs, the tech stack (Outreach, Cognism), and theoretical MEDDPICC training. The month ends with a practical certification exam. No quota is assigned.
- **Days 31-60 (Execution & Refinement):** SDRs begin live execution of outbound sequences and calling blocks. The focus is on applying knowledge with intensive weekly coaching. A ramped quota of 50% is introduced.
- **Days 61-90 (Consistency & Autonomy):** SDRs are expected to build a consistent pipeline and operate with increasing autonomy. They will be coached on deeper qualification (uncovering Metrics, Decision Process). Quota ramps to 75-100%.

The 90-Day AE Onboarding Plan

This plan is for both the two promoted BDRs and all future AE hires.

- **Days 1-30 (Immersion & Strategy):** Focus is on transitioning from lead generation to a closing mentality. This includes advanced product training, learning the MEDDPICC framework for deal management, building a territory plan, and shadowing the VP of Sales on calls.
- **Days 31-60 (Pipeline Generation & First Close):** AEs begin working leads from the SDR pool and executing their **30% self-sourcing** activities. The primary goal is to build a 3x quota pipeline coverage and secure their first new logo.
- **Days 61-90 (Ramping to Full Productivity):** The AE is expected to manage a full pipeline, demonstrate consistent application of MEDDPICC in deal reviews, and ramp to 100% of their quarterly quota.

SDR Team Structure & Mentorship

The initial SDR team will consist of **one Senior Account Development Rep (ADR)** and **three Graduate SDRs**. Their alignment with the AE team will be a phased process.

- **Phase 1 (Sept '25 - Dec '25): The Pool Model** For the first four months, the entire SDR team will operate in a "pool." They will generate opportunities for all four AEs, allowing us to assess individual SDR strengths and observe the natural working relationships that develop between the SDRs and the newly promoted AEs.
- **Phase 2 (From Jan '26): Strategic Alignment** Based on the performance and relationships observed in Phase 1, we will move to a more structured alignment:
  - The two new hire AEs will be formally assigned dedicated SDRs.
  - The two promoted AEs (former Senior BDRs) will be paired with the SDRs they have developed the strongest working relationship with.
  - To ensure fairness and balance, the AE who is paired with the Senior ADR will share that resource with the VP of Sales for strategic prospecting, mitigating any "unfair advantage."

Sales Compensation Framework

Our compensation philosophy is designed to attract top-tier talent and reward high performance, with a particular emphasis on new logo acquisition and quality pipeline generation. All plans will feature uncapped commissions and accelerators for overachievement.

- **Senior Account Executive (promoted):** A proposed £130,000 OTE (50/50 split) – annual quota of ~£765,000.
- **Account Executive (new hire):** A proposed £120,000 OTE (50/50 split) with an annual quota of ~£700,000.
- **New Logo Incentive:** The AE compensation plan will be structured to heavily reward new logo acquisition, whilst also providing commission on expansion revenue. Specific mechanisms, such as higher commission rates for new logos or quarterly SPIFs, will be implemented.
- **Senior ADR:** A proposed £85,000 OTE to reflect their "player-coach" responsibilities.
- **Graduate SDR:** A proposed £65,000 OTE.

SDR Points-Based Commission Model

SDR variable pay will not be tied to meetings booked. It will be earned via a points system that rewards the generation of high-quality, sales-accepted pipeline.

- **The Process:** An SDR generates a Sales Qualified Lead (SQL). An AE then conducts a discovery call. If the lead meets the pre-defined "deal-ready" criteria, the AE formally accepts it, converting it to a Sales Accepted Lead (SAL). Formal criteria (five points): initiative, business need, budget, relevant stakeholder, timeline.
- **The Points Structure:** Commission is tied to the total points achieved each month or quarter.
    - Sales Accepted Lead (SAL) Generated: 20 points
    - C-Level / Economic Buyer Engagement in SAL: +10 bonus points
    - Contribution to Closed-Won Deal: +25 bonus points

Performance Management Framework

We will run a disciplined operating rhythm to ensure predictability and enable continuous coaching.

Key Performance Indicators (KPIs)

- **SDRs/ADR:** Activity Levels (dials/emails), SALs (Sales Accepted Leads) Booked, SQLs (Sales Qualified Leads) Generated, Pipeline Contribution.
- **AEs:** Pipeline Coverage (target 3-4x quota), Win Rate (target 30%+), Average Deal Size, Sales Cycle Length, Quota Attainment.

Operating Cadence

- **Daily:** 15-minute SDR team stand-up to discuss priorities and challenges.
- **Weekly:** A 60-minute team pipeline meeting to review key deals and a formal forecast call using our hybrid methodology.
- **Weekly:** 30-minute 1:1s with each team member for individual coaching, deal strategy, and personal development.

PART 3: GTM EXECUTION: PROCESS & OPERATIONS

The End-to-End Sales Process

To effectively manage complex deals and ensure forecast accuracy, we will implement a formal, multi-stage sales process. This process is based on established enterprise sales methodologies and uses MEDDPICC as the exit criteria to advance a deal from one stage to the next.

Stage	Name	Weighting*	Key Activities & Goal
0	Prospecting (SQL)	1%	SDRs and AEs conduct outbound activities to generate initial interest. The goal is to book a qualification call, creating a Sales Qualified Lead (SQL) for the sales pipeline.
1	Qualification (SAL)	10%	The assigned AE conducts an initial discovery call to identify a clear business Pain and project. Exit Criteria: The opportunity is formally accepted by the AE, becoming a Sales Accepted Lead (SAL).
2	Deep Discovery	20%	The AE conducts further, in-depth discovery to fully quantify the Pain with Metrics, identify and test the Champion, and map out the Decision Process and Criteria.
3	Solutioning	40%	The AE delivers a tailored demonstration of [Company Name], focusing on how it solves the customer's specific pains and meets their Decision Criteria.
4	Proposal	60%	The AE works with the Champion to build a compelling business case and delivers a formal proposal.
5	Negotiation	80%	The AE works with the Economic Buyer and their Champion to navigate the legal and procurement Paper Process and secure a verbal commitment.
6	Closed Won	100%	The contract is signed. The AE completes a formal handover to the relevant internal teams to begin the onboarding process.

**Subject to change in line with metrics*

This structured process ensures that every opportunity in our pipeline is rigorously qualified and that our team's effort is focused on deals we have a high probability of winning.

The MEDDPICC Operating Model

MEDDPICC is the core operating system for our pipeline management. Its successful application hinges on identifying a powerful **Compelling Event**—a business-critical deadline or consequence that forces the prospect to act. The question we must always answer is, "Why must this deal happen *now*?"

The framework will be applied chronologically across our sales process, with key elements serving as the exit criteria for each stage.

Mapping MEDDPICC to the Sales Process

- **Stage 1: Qualification (SAL)**
    - **Primary MEDDPICC Focus:** Identify Pain (I)
    - **Execution:** The AE's initial discovery call is focused on uncovering a clear, acknowledged business Pain. This is the entry ticket to a real sales cycle.
- **Stage 2: Deep Discovery**
    - **Primary MEDDPICC Focus:** M-E-D-D-P-C & The Compelling Event
    - **Execution:** This is the most critical qualification stage. The AE must uncover:
        - **Metrics (M):** Quantify the Pain. What is the financial cost of this problem?
        - **Economic Buyer (E):** Identify the person with ultimate budget authority.
        - **Decision Criteria (D):** Understand the formal criteria the business will use to evaluate solutions.
        - **Decision Process (D):** Map the steps, timeline, and people involved, including (crucially) any stakeholder who can say "no".
        - **Paper Process (P):** Begin to understand the legal, security, and procurement steps required for sign-off. Identify any master service agreements or vendor onboarding requirements upfront.
        - **Champion (C):** Find and begin to test our internal advocate.
        - **The Compelling Event:** Uncover or co-create the "why now?" with the Champion.
- **Stage 3 & 4: Solutioning & Proposal**
    - **Primary MEDDPICC Focus:** Reinforcing M, D, C
    - **Execution:** The demo is tailored to the Decision Criteria. The business case in the proposal is built around the Metrics to prove ROI, equipping our Champion to sell effectively on our behalf.
- **Stage 5: Negotiation**
    - **Primary MEDDPICC Focus:** Executing on P, C, E
    - **Execution:** We execute the pre-defined Paper Process (P), leveraging our Champion (C) to navigate legal and procurement hurdles and secure the final sign-off from the Economic Buyer (E), reinforcing our differentiation against the Competition (C).

Sales Forecasting: The Hybrid Model

The sales forecast is a strategic tool that is critical for the entire business. It must be robust and reliable, enabling the CEO, COO, and CFO to make key decisions on hiring, investment, and cash flow, and to report to the board with confidence. To achieve this, we will implement a sophisticated hybrid forecasting model.

The Quantitative Baseline: Stage-Based Probability

As is current practice, our primary sales pipeline tool, Outreach, will be configured with the formal sales stages. Each stage will have a data-driven probability weighting, providing a continuous "Weighted Pipeline" value that serves as a baseline forecast and a health check on our overall pipeline coverage.

The Qualitative Judgement: Weekly Category Forecast

This is the primary methodology we will use in our weekly forecast call. The focus is on committing to a specific outcome for the Current Quarter. Each AE must categorise their key deals within Outreach:

- **Commit:** Deals the AE is 90%+ confident will close *this quarter*.
- **Best Case:** Deals that are likely to close *this quarter* but still contain some risk or timing uncertainty.
- **Pipeline:** All other qualified opportunities being actively worked.

Deals that slip from the current quarter can be re-categorised for the next quarter to provide a rolling forecast.

Focus on Granular Accuracy

To ensure the forecast is accurate on a monthly and, in time, weekly basis, AEs will be coached and incentivised to maintain precise close dates in Outreach. We will move away from "end-of-quarter" placeholders to drive real-time accuracy and predictability for the business.

The official forecast delivered to the board will be the sum of all "Commit" deals, plus a risk-adjusted percentage of the "Best Case" deals.

The GTM Technology Stack

The tech stack is designed to be a complete, non-redundant engine for the entire sales motion.

- **HubSpot (CRM):**
  - **Role:** Customer Relationship Management.
  - **Use:** HubSpot will serve as the definitive post-sale "source of truth" for all customer data, managing the client relationship after the deal is closed.
- **Outreach (Sales Engagement & Pipeline Management):**
  - **Role:** The primary operating system for the entire sales team.
  - **Use:** SDRs and AEs will use Outreach to manage all prospecting sequences, track deal stages, and log all MEDDPICC qualification data. It is the single source of truth for all sales activity and forecasting.
- **Cognism & LinkedIn Sales Navigator (Prospecting & Data):**
  - **Role:** Data Enrichment and Prospecting.
  - **Use:** These will be the primary tools for building hyper-targeted account and contact lists based on our ICP.
- **Conversation Intelligence (New Addition):**
  - **Tool:** Gong (or similar).
  - **Use:** This is the critical new addition to the stack. It will be used to record, transcribe, and analyse all sales calls. Its purpose is to accelerate new hire ramp time, enable peer-to-peer learning, and provide a data-driven foundation for all 1:1 coaching and playbook development.

ANTICIPATED CHALLENGES & MITIGATION PLAN

A key part of any credible growth plan is the proactive identification of potential challenges and the development of clear strategies to mitigate them. This plan anticipates four primary challenges that we must navigate to achieve our £10M mission.

Challenge 1: Overcoming the Significant Pipeline Deficit

The current lead flow of approximately five MQLs/SQLs per month is critically insufficient to support our ambitious growth targets. This is the most immediate operational challenge we face.

Mitigation Strategy:

1. **Build a Prolific Outbound Engine:** The immediate priority is to operationalise the new four-person SDR team. By equipping them with our modern tech stack (Outreach, Cognism, ConnectAndSell) and a clear playbook, we will build a predictable engine for generating Sales Accepted Leads (SALs).
2. **Enforce AE Self-Sourcing:** The 30% self-sourcing requirement for AEs is non-negotiable. It creates a second layer of prospecting, reduces reliance on the SDR team, and fosters a culture of full pipeline ownership.
3. **Formalise a Marketing SLA:** I will work with the marketing department to establish a formal Service Level Agreement (SLA) that defines the required volume and quality of MQLs needed to support the sales team's quota.

Challenge 2: Executing the Business Transformation

Pivoting the company's revenue from 91% agency services to 80% SaaS is a fundamental transformation. The key obstacle identified so far has been a tendency to move from "deep qual, straight to demo," which is a feature-led approach, rather than the value-based approach required for enterprise SaaS.

Mitigation Strategy:

1. **Operationalise MEDDPICC:** The MEDDPICC model is our primary tool for this transformation. It will be embedded into our sales stages in Outreach, forcing a shift from discussing features to quantifying Pain with Metrics and aligning with the Economic Buyer's objectives.
2. **Align Compensation to the Mission:** The new compensation plan, which heavily rewards new SaaS logo acquisition and uses a points system to incentivise quality SALs, will align the team's financial motivations directly with the SaaS-first strategic goal.

Challenge 3: Managing Channel Conflict & Brand Identity

The research report correctly identifies the risk of selling [Company Name] to other marketing agencies who are direct competitors of [Company Name]. This could limit our total addressable market.

Mitigation Strategy:

1. **Formalise the "Certified Partner" Model:** We will adopt the strategic recommendation from the research report. [Company Name] will be the master technology brand. [Company Name] will be positioned as its first and leading "Certified Expert Implementation Partner." This reframes the relationship from competitor to role model, creating an ecosystem for other agencies to join.

2. **Specialise the Sales Team:** As we scale, we will dedicate specific AEs to the "Agency" vertical. These reps will become experts in selling to agencies, understanding their unique pain points, and neutralising the conflict objection.

Challenge 4: Defending the "xx% Accuracy" Moat

Our 96% forecasting accuracy claim is a powerful competitive advantage but will come under intense scrutiny from sophisticated buyers.

Mitigation Strategy:

1. **Develop a "Validation Toolkit":** I will work with the Product and Data Science teams to create a sales enablement toolkit. This will include a clear document explaining the methodology, sanitised case studies with verifiable data, and a framework for running a proof-of-concept (POC) for large enterprise deals.

2. **Rigorous Training:** The sales team will be rigorously trained on how to present this claim, answer tough questions, and pivot the conversation from the number itself to the business value it creates for the customer.

THE NEXT HORIZON: A PROVISIONAL OUTLOOK FOR YEAR 4 & 5

Upon achieving the £10M revenue mission at the end of Year 3, the company will have significant strategic options and will be positioned for its next phase of growth. The following is a provisional, high-level outlook for how we can build on that success to achieve global scale and cement our market leadership.

This outlook is designed to be flexible and would be refined based on the performance and learnings from the initial three-year plan.

Year 4: Scaling the Core & Expanding the Footprint

The theme for Year 4 is to translate our proven UK success into a scalable international model and to formalise new growth channels.

- **US Market Penetration:** We will execute the plan developed in Year 2 by hiring our first US-based Account Executives and SDRs. The goal is to establish a strong "beachhead" in the North American market, focusing on securing flagship customers in our core ICPs.
- **Formalise the Partnership Programme:** We will hire a dedicated Partnerships Manager. Their mission will be to evolve the opportunistic partnerships developed in Years 1-3 into a structured programme, focusing on scalable tech integrations and channel reseller agreements.
- **Optimise Product-Led Growth (PLG):** We will analyse the data from the Shopify App launch to aggressively optimise our PLG motion. This will involve refining the self-serve pricing tiers and potentially expanding our app presence to other major e-commerce ecosystems.
- **Deepen Customer Focus:** With a mature customer base, the Account Management function will be fully established to drive Net Revenue Retention (NRR) and strategic growth within our most valuable accounts.

Year 5: Cementing Global Leadership

The theme for Year 5 is to leverage our scale to build an unassailable competitive moat and prepare for the next major financial event.

- **International Expansion (Phase 2):** Based on the success of the initial US launch, we would explore expansion into other key English-speaking markets (e.g., Canada, Australia) or begin initial discovery for key European markets.
- **Verticalisation:** We will deepen our competitive advantage by launching industry-specific versions of the [Company Name] platform (e.g., "[Company Name] for B2B SaaS"), complete with tailored features, benchmarks, and GTM campaigns.
- **Strategic M&A:** From a position of financial strength, the company could begin to evaluate acquiring smaller, complementary technologies to accelerate the product roadmap or enter new market segments.
- **Preparing for the Next Milestone:** By the end of this period, the company would be a prime candidate for a major secondary funding round (Series B), a strategic acquisition by a larger MarTech player, or a private equity buyout.

APPENDIX A: FINANCIAL & QUOTA CAPACITY MODEL (3-YEAR PLAN)

Foundational Metrics & Assumptions

This plan is built on the following core assumptions and target conversion rates.

- **Conversion Rates:**
  - MQL-to-SQL: 5%
  - SQL-to-SAL: 30%
  - SAL-to-Win: 35%

- **ACV by Deal Type:**
  - Mid-Market (MM) Deal: £30,000
  - Enterprise (Ent) Deal: £120,000

- **AE Annual Quotas (based on a 17% OTE:Target Ratio):**
  - AE (Promoted): £130k OTE → £765,000 Quota
  - AE (Hired): £120k OTE → £700,000 Quota
  - Senior AE (Enterprise - Y2+): £160k OTE → £940,000 Quota

- **SDR Compensation:** SDR variable pay is earned by hitting a SAL quota, which is measured by a points system that rewards pipeline quality.

The 3-Year New ARR & Headcount Plan

This table outlines the top-level targets and the required headcount to achieve them.

Metric	Y1 / FY25	Y2 / FY26	Y3 / FY27
New ARR Target	£1.45M	£2.60M	£5.10M
Headcount (End of Year)			
Account Executives (MM)	4	5	9
Senior AEs (Enterprise)	0	2	4
Senior ADR (Manager)	1	0	0
SDRs	3	7	12

Detailed Year 1 / FY25 Operational Plan

Hiring/Ramp Timeline:

- **Promoted AEs (2):** Start Sept, ramped by Nov. (9 productive months).
- **New Hire AEs (2):** Start Jan, ramped by Mar. (5 productive months).
- **SDR Team (4):** Hired Oct, ramped by Jan. (7 productive months).

AE Plan (Year 1) - All deals are Mid-Market (£30k ACV)

AE Type	Headcount	Prorated Quota	Deals Needed	SALs Needed from SDRs (70%)
AE (Promoted)	2	£1.15M	38	76
AE (Hired)	2	£583k	19	38
TOTAL	**4**	**£1.73M**	**57**	**114**

SDR Plan (Year 1)

- The AE team *needs* **114 SALs**.
- With a **20% overassignment**, the SDR team's official target is **137 SALs** for their 7 productive months.

SDR	Role	Prorated SAL Target (Y1)	Monthly SAL Target
SDR 1	Senior ADR	37	~5.3
SDR 2	Graduate SDR	33	~4.7
SDR 3	Graduate SDR	33	~4.7
SDR 4	Graduate SDR	34	~4.9

Individual Weekly Activity Plan

This details the weekly activities required for AEs and SDRs to hit their respective SAL targets. It assumes an 8% connect-to-SAL rate and an 8% dial-to-connect rate.

AE Weekly Self-Sourcing Activity (Target: ~2-4 SALs / Month)

Metric	Monthly Target	Weekly Target
SALs Needed	2-4	
Conversations ("Connects")	25-50	~6-12
Dials & Personalised Emails	312-625	~70-140

Graduate SDR Weekly Activity (Target: ~4.8 SALs / Month)

Metric	Monthly Target	Weekly Target
SALs Needed	4.8	
Conversations ("Connects")	60	~14
Dials Needed	750	~175
Calling Hours		~4.5 Hours

High-Level Year 2 & 3 Operating Plan

In subsequent years, the plan introduces Senior AEs focused on Enterprise deals.

Year 2 (FY26) - New ARR Target: £2.6M

- The team of 5 AEs will target ~60 Mid-Market deals (£1.8M).
- The 2 new Senior AEs will target ~7 Enterprise deals (£0.8M).
- The expanded SDR team will need to generate ~250 SALs to fuel this growth.

Year 3 (FY27) - New ARR Target: £5.1M

- The team of 9 AEs will target ~84 Mid-Market deals (£2.5M).
- The team of 4 Senior AEs will target ~22 Enterprise deals (£2.6M).
- The fully scaled SDR team will need to generate ~300 SALs.

APPENDIX B: GTM PLAYBOOK OUTLINE

VP Sales will write a detailed Sales Playbook for the team to use – initial outline of structure below.

Introduction & Our Mission

1. Welcome to the [Company Name] Sales Team
2. Our Vision & The "SaaS-Led with Strategic Services" GTM Model
3. Our Culture & Values (Including the 1moreChild CSR mission)

Understanding Our Market & Customer

1. Market Overview & Key Trends (The Cookieless World, Rise of AI)
2. Ideal Customer Profiles (ICPs)
   - ICP Deep Dive: The Digital Marketing Agency
   - ICP Deep Dive: The E-commerce Retailer
   - Additional / Future ICPs
3. Key Customer Pains We Solve
4. Competitive Landscape & Our Differentiation (The "Decision Engine")

The Sales Process

1. Overview of the 6 Sales Stages (Prospecting to Close)
2. Entry & Exit Criteria for Each Stage

Prospecting & Pipeline Generation

1. SDR & ADR Roles and Responsibilities
2. AE Self-Sourcing: The 30% Rule
3. Building Your Target Account List (Using Cognism & Sales Navigator)
4. Outreach Sequences: Email & LinkedIn Best Practices
5. Calling Scripts & Objection Handling Guide

The MEDDPICC Operating Model: A Deep Dive

1. Identifying the Compelling Event: The "Why Now?"
2. Metrics: How to Quantify Pain and Build a Business Case
3. Economic Buyer: How to Identify, Map, and Engage
4. Decision Criteria: Uncovering What Matters
5. Decision Process: Mapping the Path to Signature (and who can say "no")
6. Paper Process: De-risking Deals by Uncovering Procurement & Legal Steps Early
7. Identify Pain: Core Discovery Questions
8. Champion: How to Find and Test Your Internal Advocate
9. Competition: How to Position and Differentiate Against Competitors

Our Solutions

1. [Company Name]: Product Deep Dive & Key Value Propositions
2. Defending the "96% Accuracy" Claim
3. 6.3 [Company Name]: Attaching Strategic Service Packages

Rules of Engagement & Operations

1. The SDR-to-AE Handoff Process (The SAL Criteria)
2. Engaging Pre-Sales & Post-Sales Resources (AE to SE/CSM Handoff)
3. Territory & Account Ownership Rules
4. Using the Tech Stack (Outreach, HubSpot, Gong)
5. Forecasting Guide: How to Use the Hybrid Model

Compensation Plans

1. AE & Senior AE Compensation Explained
2. The SDR Points System Explained

APPENDIX C: PROPOSED GTM BUDGET FOR YEAR 1 (FY 25)

Line Item	Assumptions / Rationale	Total FY25 Cost
1. Personnel Costs (Prorated OTE)		
VP of Sales	On the books for 11 months (Sept-Jul) @ £250k OTE.	£229,167
AEs (Promoted) x 2	In the role for the full 12 months @ £130k OTE each.	£260,000
AEs (Hired) x 2	Hired Jan '26, on the books for 7 months @ £120k OTE each.	£140,000
Senior ADR x 1	Hired Oct '25, on the books for 10 months @ £85k OTE.	£70,833
Graduate SDRs x 3	Hired Oct '25, on the books for 10 months @ £65k OTE each.	£162,500
Subtotal		***£862,500***
2. Recruitment Costs		
New Hires (6)	Assumes 20% of base salary for 2 new AEs, 1 Senior ADR, and 3 Graduate SDRs. Does not include VP executive search fee.	£57,600
Subtotal		***£57,600***
3. Technology & Software		
Existing Stack (Outreach, Cognism, Hubspot etc.)	Based on the existing budget for the core sales tech stack.	£24,500
Conversation Intelligence (Gong)	A new, critical addition for coaching and ramping the team. Based on an estimate for a team of this size.	£18,000
Subtotal		***£42,500***
4. Travel & Entertainment (T&E)		
Sales Team T&E	A budget for client meetings, travel to key events (e.g., BrightonSEO, ShopTalk), and team building.	£20,000
Subtotal		***£20,000***
5. Marketing & Other		
Sales-Led Marketing	A discretionary budget for the sales team to use for targeted activities like high-value direct mail or small prospect dinners.	£15,000
Subtotal		***£15,000***
TOTAL PROPOSED Y1 GTM BUDGET		**£997,600**