

THE SMARKETERS | YOUR GROWTH CATALYST

The GTM Playbook for IT Services & System Integrators **2026 Edition**

From Staff Augmentation to Outcome Engineering.
Stand Out. Win Bigger. Deliver Faster.

Executive Summary: What Changes in 2026

- **Buyers demand outcomes:** Shift from input-based staffing to shared-risk, outcome-based engineering models.
- **Package around use cases:** Move away from generic capabilities; sell clear solutions with defined SLAs.
- **Ruthless prioritization:** Focus deep on 3–5 industries and 6–8 repeatable plays rather than being generalists.
- **Full-funnel engine:** Integrate demand creation, capture, and expansion into a unified revenue motion.
- **Strategic Account Focus (ABM):** Treat top accounts as individual markets with bespoke consultative selling.
- **Hybrid Operating Model:** Leverage a tight internal core team augmented by specialized agency partners for scale.
- **Metrics that matter:** Track pipeline quality, CAC payback, and NRR over vanity metrics like lead volume.

WHAT TO DO NOW

Audit your current offer portfolio against these shifts. Identify the top 2 verticals where you have the strongest "right to win" and build your first outcome-based offer pilot within 30 days.

The Shift: From Staff Augmentation to Outcome Engineering

Moving from selling "effort" to selling "results" is the defining challenge of 2026.

THE OLD MODEL

"Staff Augmentation"

-  Rate cards & generic hourly billing
-  "Bodies on projects" (Headcount focus)
-  RFP-led & commoditized price pressure
-  Input-based metrics (Hours worked)

VS

THE 2026 MODEL

"Outcome Engineering"

-  Outcome charters with defined time-to-value
-  Co-owned KPIs & shared commercial risk
-  Flexible models (Milestone / Fixed / Consumption)
-  AI-enabled delivery, FinOps & Security-first

What Buyers Expect in 2026

The purchasing criteria have evolved from "cost & capacity" to "proof & speed".



Evidence & Trust

- ▶ Referenceable outcomes with clear metrics (e.g., "Reduced cloud spend by 30%").
- ▶ Deep domain fluency—speaking the specific language of their industry.
- ▶ Compliance-by-design assurance from day one.



Velocity & Innovation

- ▶ AI acceleration baked into delivery (Copilots, automated testing).
- ▶ Pre-built IP and accelerators to skip the "setup" phase.
- ▶ FinOps discipline to control run-costs proactively.

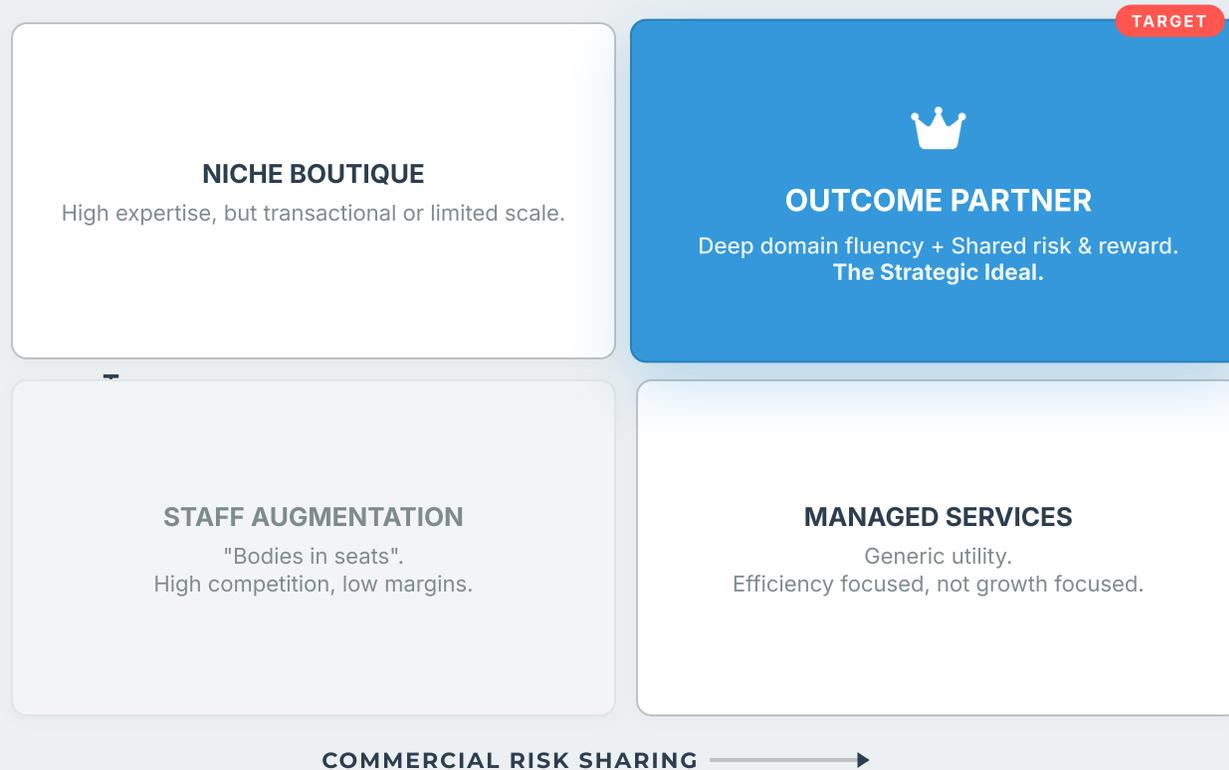


Commercial Flexibility

- ▶ Transparent pricing models linked to milestones.
- ▶ Low-risk "Proof of Value" pilots (4-6 weeks) to start fast.
- ▶ Shared risk/reward options for mature engagements.

Positioning: Become the Outcome Partner

Move from low-value commodity zones to the high-value strategic quadrant.



Strategic Moves

Define 'Why Us'

Articulate a value proposition that goes beyond "quality talent" to specific business results.

Sharpen Your ICP

Target clients willing to pay for outcomes, not just hours.
Disqualify price-shoppers early.

Proof with IP

Use proprietary frameworks, accelerators, and certifications to validate your "Right to Win".

Focus: Verticals and Repeatable Use Cases

Stop being "agnostic." Win by solving specific problems for specific industries.

STRATEGIC VERTICALS

Where you have permission to win.

SELECTION CRITERIA

-  **Market Growth:** Sectors with active digital spend (e.g., >8% CAGR).
-  **Win Record:** 3+ referenceable logos and proven outcomes.
-  **Compliance Fit:** High barrier to entry (HIPAA, SOC2, PCI).

PRIORITY SECTORS (EXAMPLES)

BFSI & Fintech

Healthcare & Life Sciences

Advanced Manufacturing

SaaS & Tech Platforms

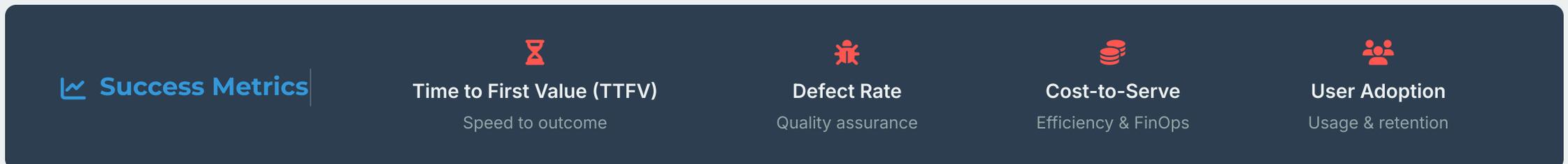
REPEATABLE USE CASES

Packaged solutions that accelerate sales cycles.

-  **Cloud Cost Optimization (FinOps)**
Audit, governance, and automated waste reduction.
-  **Modern Data Platform Build**
Unified data lakehouse for AI readiness.
-  **App Modernization & DevSecOps**
Containerization and CI/CD for velocity.
-  **CX Automation & AI Copilots**
GenAI agents for support and internal knowledge.

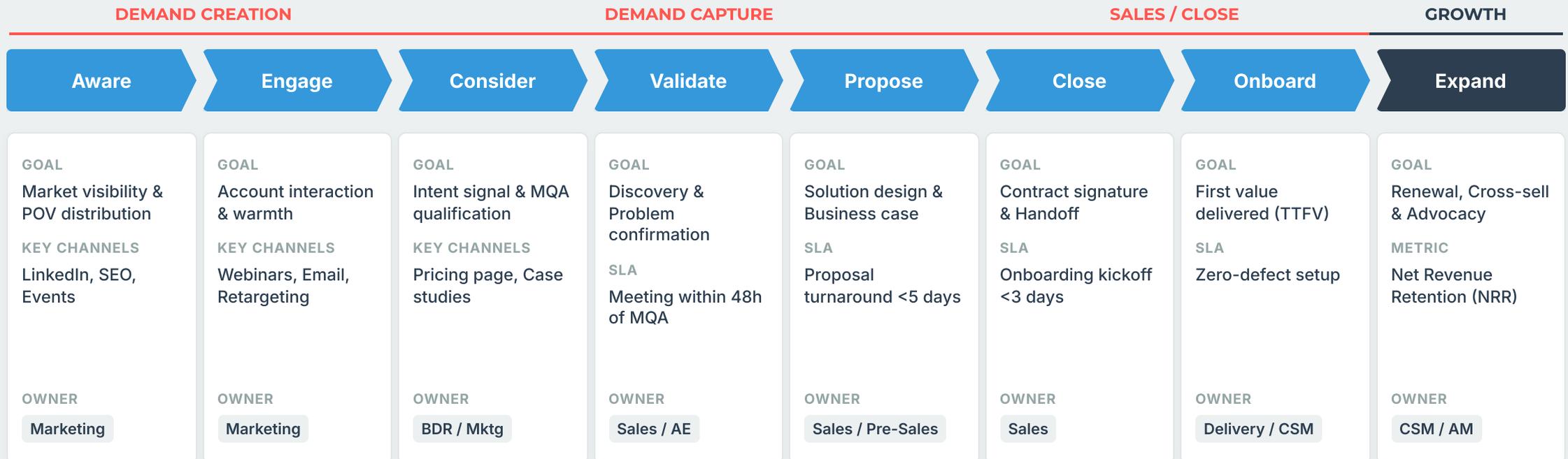
Offer Architecture

A structured path from advice to scaled outcomes.



The Full-Funnel GTM Model

A unified revenue engine from awareness to expansion.



Demand Creation (Top of Funnel)

- 🗨️ **Narrative POVs over Generic Specs:** Publish opinionated perspectives on industry challenges (e.g., "Why Cloud Costs are Killing FinTech Innovation") to polarize and attract.
- 🏗️ **SEO Topic Clusters & Pillar Pages:** Dominate niche search intent by building deep, interconnected content webs around key repeatable use cases.
- 👤 **LinkedIn Leadership & Employee Advocacy:** Activate subject matter experts (SMEs) to share insights daily, moving beyond corporate page updates.
- 📄 **Utility-Based Content:** Offer practical value upfront through calculators, readiness checklists, and architecture templates—not just brochures.
- 🤝 **Partner Co-Marketing Ecosystems:** Leverage hyperscaler (AWS/Azure) and SaaS partner channels for joint webinars and community events.

✓ DO THIS NEXT

- 1 Identify your top 3 SMEs and build a 30-day LinkedIn posting schedule for them.
- 2 Audit existing blog content and consolidate thin posts into one authoritative "Pillar Page" for a key offer.
- 3 Create one "ungated" high-value asset (e.g., a migration checklist) to build trust before asking for data.

Demand Capture and Conversion

Turning high intent into pipeline requires specific assets and a rapid response system.

THE ASSETS

High-intent pages & social proof



High-Intent Pages

Industry-specific landing pages, transparent pricing tiers, and solution comparisons.



Trust & Validation

Active management of G2/Clutch profiles and verified client video testimonials.



Comparison Content

"Us vs. Them" guides and detailed ROI calculators for specific use cases.



THE SYSTEM

Speed, routing, and enablement



Speed-to-Lead SLA

<5 minute response time for inbound. Auto-booking (Calendly) for qualified leads.



Routing & Qualification

Clear MQA definitions. Chatbots route simple queries; humans handle high-value intent.

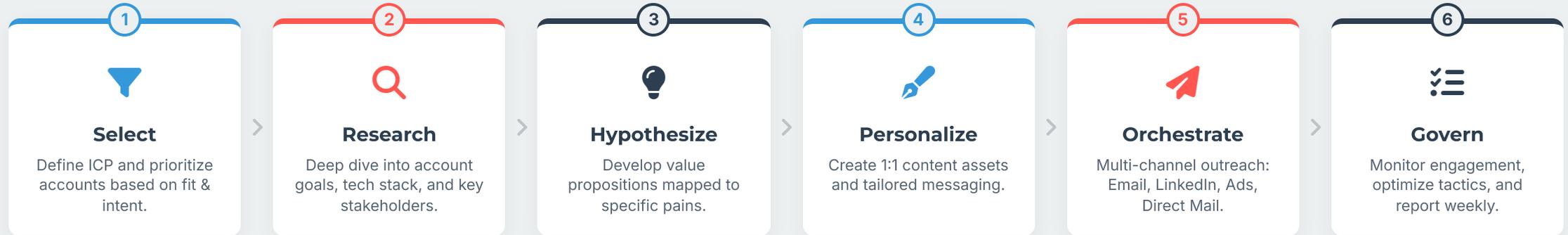


Enablement & Cadences

Structured BDR cadences (email/call/social) supported by battlecards and case snippets.

ABM for Strategic Accounts: How We Work

A rigorous, data-driven methodology for high-value account penetration.



 **Key Outputs**


Account Dossiers
Deep Intel


Message Matrix
Persona-Based


Campaign Calendar
Execution Plan


Bi-Weekly Sync
Performance Review

ABM Tiers & Tactics

Allocating resources and personalization depth based on account potential.



Tier 1: Strategic (1:1)

10-20 ACCOUNTS

- ▶ **Hyper-Personalization:** Bespoke value narratives and research reports for each account.
- ▶ **Executive Programs:** 1:1 workshops, direct mail door-openers, and leadership alignment.
- ▶ **Dedicated Squad:** Sales, marketing, and delivery leads meet weekly.

KEY METRIC

Engagement Depth & Deal Acceleration



Tier 2: Scale (1:Few)

30-60 ACCOUNTS

- ▶ **Cluster Themes:** Content tailored to sub-industries or specific use-case clusters.
- ▶ **Workshops & Events:** Small group roundtables and vertical-specific webinars.
- ▶ **Orchestration:** Personalized LinkedIn outreach + paid social air cover.

KEY METRIC

MQA Rate & Pipeline Contribution



Tier 3: Programmatic

200+ ACCOUNTS (1:MANY)

- ▶ **Industry Plays:** Broad vertical content syndication and intent-based targeting.
- ▶ **Tech-Touch:** Automated nurture tracks triggered by intent signals.
- ▶ **Awareness:** Programmatic display ads to build brand familiarity.

KEY METRIC

Coverage Reach & Intent Spikes

Consultative Selling Motions

Moving from order-taking to problem-solving with a structured sales approach.



1. Discovery & Diagnosis

Deep dive into business outcomes, blockers, and constraints rather than just technical specs. Validate the "Cost of Inaction".



2. Qualification (MEDDPIC)

Rigorously qualify metrics, economic buyer, decision criteria, and paper process. Establish a Mutual Action Plan (MAP).



3. Value Proof & Solution Design

Present a business case with clear ROI models. Design a low-risk pilot or POV to validate technical feasibility.



4. Deal Strategy & Multi-Threading

Engage multiple stakeholders (IT, Finance, LOB) to build consensus. Leverage partner channels to accelerate trust.



Artifacts to Bring



Mutual Action Plan (MAP)



ROI / TCO Model



Pilot Success Charter



Risk Register & Mitigation



Stakeholder Map

Sales Plays & Buying Triggers

Cloud Cost Spike Detected

Pitch: FinOps Assessment & Modernization Sprint (Quick-win audit).

New Regulatory Compliance (e.g., DORA, EU AI Act)

Pitch: Secure Data Platform & Governance Framework (Risk reduction).

Product Roadmap Delays Reported

Pitch: Engineering Velocity Pods (Outcome-based acceleration).

Surging Support Ticket Volume

Pitch: AI Agent Implementation + Knowledge Base Automation (CX efficiency).

Tech Stack Consolidation Initiative

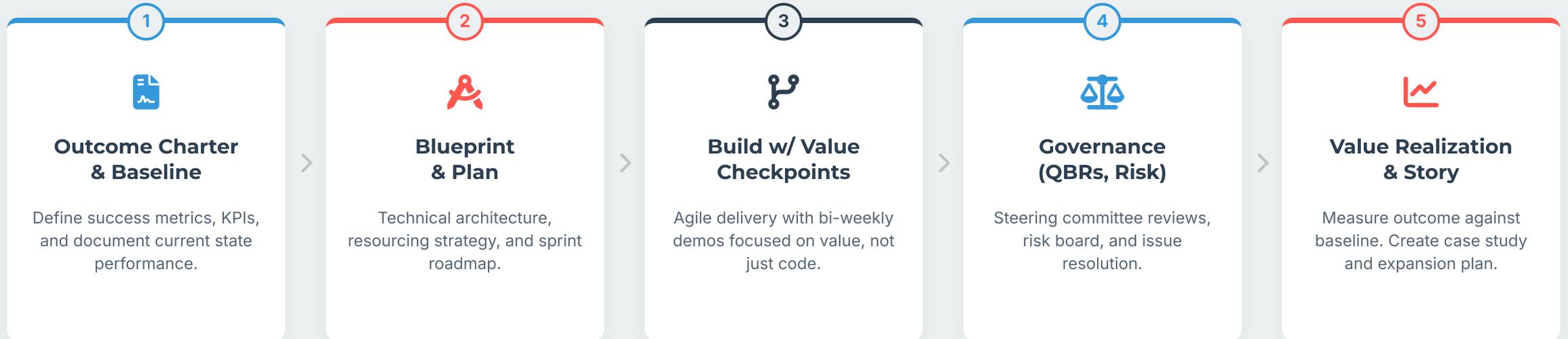
Pitch: Platform Engineering & Toolchain Optimization (Cost/Complexity reduction).

SIGNAL SOURCES

-  Earnings calls & 10-K reports (OpEx pressure)
-  Hiring patterns (Spike in "DevOps" or "AI" roles)
-  Tech stack data (New cloud/SaaS adoption)
-  Public outage or security incident reports
-  Industry regulatory deadlines approaching

Outcome Engineering: Delivery Method

A rigorous path from baseline metrics to realized value.



Artifacts & KPIs

 Outcome Charter

 Solution Blueprint

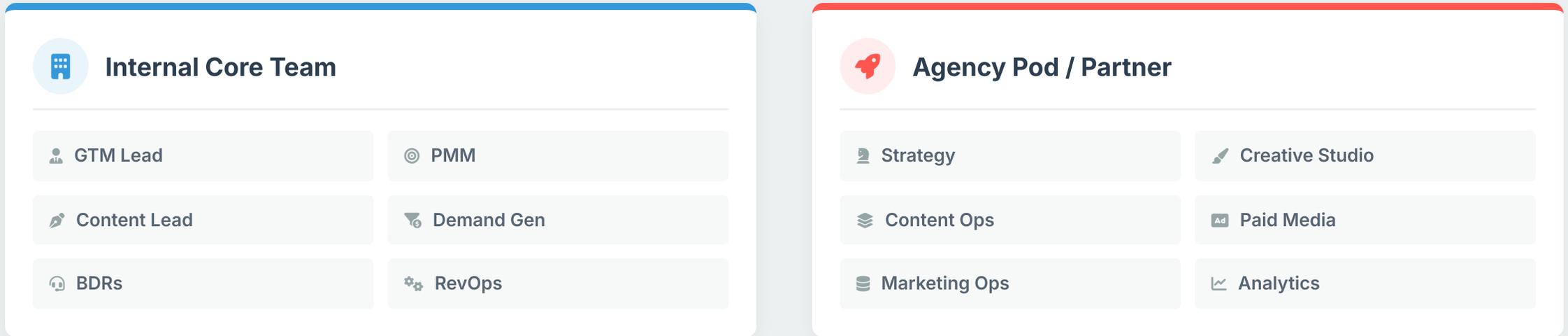
 Risk Register

 Velocity Report

 NPS / CSAT Score

Operating Model: Internal Team + Agency

One team, one backlog, shared outcomes. A hybrid model for velocity.



Revenue Operating Cadence **SHARED OKRS** Weekly Sprints Single Backlog Unified Targets

RACI MATRIX (SIMPLIFIED)

| Activity | Internal Lead | Agency Pod | GTM Head |
|------------------------|---------------|------------|----------|
| Strategy & Positioning | C | R | A |
| Campaign Execution | A | R | I |
| Content Production | | R | I |

Measurement & KPIs

Tracking the health of the entire revenue engine, not just activity.

★ NORTH STAR METRICS

115% NET REVENUE RETENTION (NRR)

< 9 Mo CAC PAYBACK

-20% SALES CYCLE TIME

Marketing

| | |
|---------------------|--------------------------|
| High-Intent Traffic | Growth % |
| MQA Volume | # Qualified Accts |
| Cost per MQA | \$ Target |
| MQA to SQL Rate | % Conversion |

Sales

| | |
|---------------------|---------------------|
| Pipeline Coverage | 3x - 4x |
| Win Rate | % Closed Won |
| Avg Deal Size (ACV) | \$ Value |
| Sales Velocity | \$ / Day |

ABM Impact

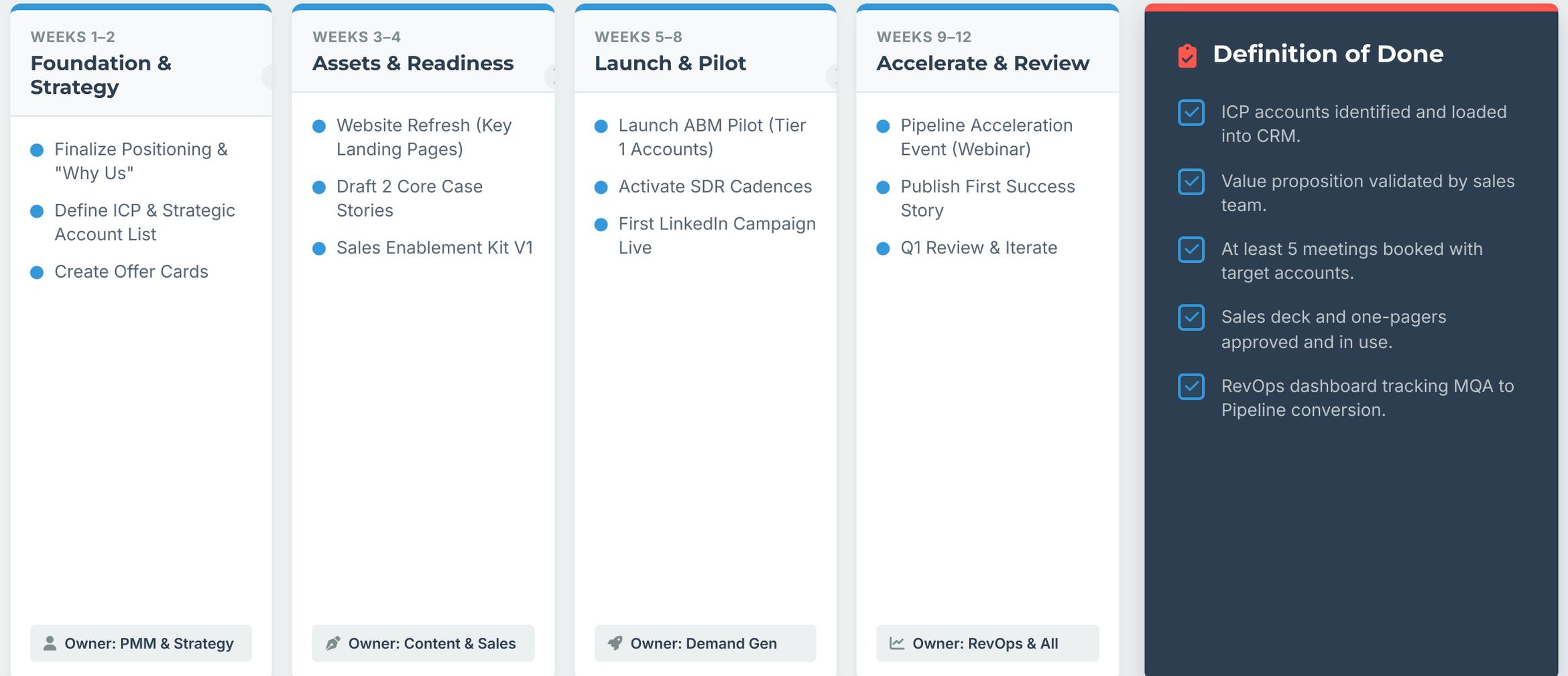
| | |
|---------------------|--------------------------|
| Account Engagement | Score / Tier |
| Meeting Rate | % of Target Accts |
| Influenced Pipeline | \$ Amount |
| Penetration Rate | % Contacts |

Delivery & CS

| | |
|---------------------|-----------------------------|
| Time to First Value | Days |
| CSAT / NPS | Score |
| Project Margin | % Profitability |
| Expansion Revenue | \$ Upsell/Cross-sell |

90-Day GTM Sprint Plan

A phased execution roadmap from foundation to revenue acceleration.



Case Snapshot: Outcome Story

Real-world results: Modernization of Legacy Core.

CLIENT PROFILE

Fortune 500 Financial Services firm struggling with technical debt and slow release cycles.

THE CHALLENGE

Rising cloud costs (+40% YoY) and inability to scale customer-facing apps due to monolithic architecture.

OUR APPROACH

Executed a 12-week Modernization Accelerator: FinOps audit, containerization of 3 core apps, and CI/CD automation implementation.

Outcomes

38% Reduction in Monthly Cloud Spend

3x Faster Release Velocity

9.2 CSAT Score (out of 10)

“

"The Smarketers team didn't just staff the project; they owned the outcome. We achieved in one quarter what we struggled to do in two years."

— CTO, Global Financial Services

Ready to Engineer Outcomes?

Transform your GTM engine from activity-based to outcome-driven in 90 days.

[GET YOUR PLAYBOOK AUDIT →](#)

- 1 Schedule a GTM working session (2 hours) to audit current maturity.
- 2 Confirm your Ideal Customer Profile (ICP), Offer Architecture, and ABM Tiers.
- 3 Kick off the 90-day sprint with a shared backlog and revenue targets.

ICP Definition Worksheet

Define your Ideal Customer Profile with precision. Fill out for each target segment.

FIRMOGRAPHICS

Industry: {e.g. Fintech, Healthcare}

Size/Rev: {e.g. 500-2000 FTE, \$100M+ ARR}

Geo: {e.g. North America, UK}

TECHNOGRAPHICS

Cloud/Infra: {e.g. AWS heavy, Kubernetes}

Data Stack: {e.g. Snowflake, Databricks}

Security: {e.g. SOC2, ISO27001 required}

BUYING COMMITTEE

Champion: {e.g. VP Engineering, CTO}

Influencer: {e.g. Lead Architect, Devops Mgr}

Econ Buyer: {e.g. CFO, CIO}

BUSINESS TRIGGERS

Events: {e.g. Funding round, M&A}

Pain Points: {e.g. Compliance audit failure}

Compliance: {e.g. GDPR, HIPAA deadline}

DISQUALIFIERS

Tech: {e.g. On-prem only, Legacy Mainframe}

Budget: {e.g. <\$50k project value}

Culture: {e.g. RFP-only, transactional}

PRIORITIZATION SIGNALS

Hiring: {e.g. Hiring 'Head of Platform'}

Intent Data: {e.g. Researching 'Cloud Cost'}

Growth: {e.g. >20% headcount growth}

FIT SCORING (0-5)

FIT MATCH

PAIN LEVEL

TIMING

ACCESS

Vertical Selection Scoring

Data-driven prioritization to focus resources where we win.

| Industry Vertical | TAM Growth | Win Record | Compliance Fit | Partner Eco. | Margin Pot. | Deal Velocity | Cross-sell | TOTAL |
|--------------------------|------------|------------|----------------|--------------|-------------|---------------|------------|-------|
| <i>Weighting (Max 5)</i> | 20% | 20% | 15% | 15% | 15% | 10% | 5% | 100 |
| FinTech & Payments | 5 | 5 | 5 | 4 | 5 | 3 | 4 | 4.65 |
| Healthcare Provider | 4 | 4 | 5 | 3 | 4 | 2 | 3 | 3.85 |
| Manufacturing (Auto) | 3 | 4 | 3 | 5 | 3 | 4 | 4 | 3.65 |
| Retail & CPG | 3 | 2 | 2 | 4 | 2 | 5 | 3 | 2.85 |
| Public Sector | 2 | 3 | 4 | 2 | 3 | 1 | 2 | 2.65 |
| Higher Ed | 1 | 2 | 2 | 2 | 1 | 2 | 1 | 1.65 |



SELECTION RULE OF THUMB

Pursue only the **Top 3 Verticals** for at least 2 consecutive quarters. Do not dilute GTM focus on scores below 3.5.

Offer Card Template: Packaged Outcome

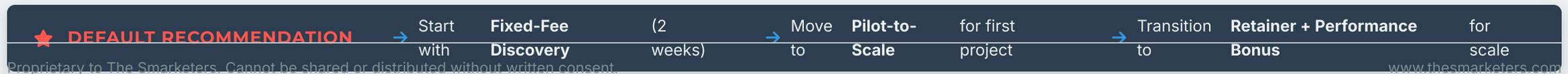
Standardized definition for outcome-based services to enable scalable selling.

| OFFER NAME | IDEAL BUYER PROFILE | TIMELINE |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p>Cloud Modernization Accelerator</p> <p>Example Outcome</p> | <p>CTO / VP Engineering</p> <p>Trigger: Cost spike or compliance audit</p> | <p>12 Weeks</p> <p>Fixed Duration</p> |
| <p>🎯 PRIMARY OUTCOMES</p> <ul style="list-style-type: none">• 30% reduction in cloud spend run-rate• Containerization of top 3 legacy apps• FinOps governance framework established | <p>☰ SCOPE & INCLUSIONS</p> <ul style="list-style-type: none">• Infrastructure audit & tagging• Refactoring of 3 key microservices• CI/CD pipeline implementation (GitHub Actions)• Team training workshops (2 sessions) | <p>🚫 OUT OF SCOPE</p> <ul style="list-style-type: none">• Full database migration (Oracle to Postgres)• UI/UX redesign• 24/7 Support SLA during build phase |
| <p>👥 TEAM & ROLES</p> <ul style="list-style-type: none">• 1x Solution Architect (Part-time)• 2x Senior DevOps Engineers• 1x FinOps Analyst• 1x Delivery Manager | <p>📦 KEY DELIVERABLES</p> <ul style="list-style-type: none">• Architecture Blueprint V2• Terraform / IaC Scripts Repository• Cost Optimization Report• Executive Dashboard for Cloud Spend | <p>📈 SUCCESS METRICS (KPIs)</p> <ul style="list-style-type: none">• Time-to-deploy: < 2 hours• Infra cost savings: > \$10k/mo• Security score: > 90% (CIS Benchmarks) |
| <p>💎 PRICE RANGE</p> <p>\$85,000 - \$120,000</p> <p>Fixed Fee Pilot</p> | <p>🛡️ RISK-SHARING OPTION</p> <p>Gainshare Model:</p> <p>We take 20% of first-year cloud savings if savings exceed 20% baseline.</p> | <p>📋 PREREQUISITES</p> <ul style="list-style-type: none">• Access to AWS/Azure billing console• Codebase access (Git)• Designated internal product owner |

Pricing & Risk-Sharing Menu

Commercial models designed to align incentives and accelerate decisions.

| | | |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p>Fixed Fee LOW RISK</p> <p>WHEN TO USE Well-defined scope (e.g., Audits, MVPs) where requirements are clear.</p> <p>PROS</p> <ul style="list-style-type: none">✓ Predictable budget for client✓ High margin if efficient <p><i>Requires strict change control process.</i></p> | <p>Milestone-Based STAGED</p> <p>WHEN TO USE Large projects needing stage-gates (e.g., Platform Builds).</p> <p>PROS</p> <ul style="list-style-type: none">✓ Cash flow aligned to value✓ Reduces "big bang" risk <p><i>Define unambiguous acceptance criteria.</i></p> | <p>Consumption / Unit FLEXIBLE</p> <p>WHEN TO USE Variable volume work (e.g., Migrations per VM, Support Tickets).</p> <p>PROS</p> <ul style="list-style-type: none">✓ Client pays only for use✓ Scales with demand <p><i>Set minimum monthly commitment (floor).</i></p> |
| <p>Pilot-to-Scale INCENTIVE</p> <p>WHEN TO USE New relationships needing trust. Pilot fee credited back if scaled.</p> <p>PROS</p> <ul style="list-style-type: none">✓ Low barrier to entry✓ Locks in larger deal early <p><i>Pilot must have hard time-box (4-6 weeks).</i></p> | <p>Gainshare / Bonus OUTCOME</p> <p>WHEN TO USE Cost-saving or revenue-gen projects (e.g., FinOps, Conversion Opt).</p> <p>PROS</p> <ul style="list-style-type: none">✓ High upside potential✓ total alignment of interest <p><i>Cap downside at cost; cap upside at 3x.</i></p> | <p>Retainer + Pod PARTNER</p> <p>WHEN TO USE Ongoing innovation or "Engineering as a Service" partnerships.</p> <p>PROS</p> <ul style="list-style-type: none">✓ Guaranteed team availability✓ Smooths revenue/spend <p><i>Quarterly utilization reviews required.</i></p> |



Content System + 90-Day Editorial Calendar

Turning a single POV into a 12-week engine of engagement.

The "Atomization" System



1. Core POV Narrative

Strategic theme (e.g., "FinOps for GenAI"). Defines the problem, stakes, and unique approach.



2. Anchor Asset (Big Rock)

One deep resource per month: Technical Guide, Webinar, or Comprehensive Industry Report.



3. Derivative Content

Slice anchor into: 4 blog posts, 8 LinkedIn slides, 1 checklist, and 3 short video clips.



4. Distribution Channels

Email nurture, Sales enablement kit, Partner newsletters, and Paid LinkedIn ads.

Execution Calendar (Sample Q1)

Month 1: Foundation

Week 1: POV Launch
Publish "Why Change"
Manifesto

Owner: PMM

Week 2: Anchor Webinar
Live event + recording

Owner: Demand Gen

Week 3: Sales Enablement
Battlecards & email scripts

Owner: Content

Week 4: Blog Deep Dive
Tech pillar: Architecture

Owner: SMEs

Month 2: Validation

Week 5: Case Study
Client success story
release

Owner: Content

Week 6: Social Sprint
Exec LinkedIn series (3x)

Owner: Social

Week 7: Comparison Guide
"Us vs. DIY vs.
Competitors"

Owner: PMM

Week 8: Repurpose Ops
Webinar → 3 Video
Shorts

Owner: Social

Month 3: Expansion

Week 9: Interactive Tool
ROI Calculator / Grader

Owner: Demand Gen

Week 10: Partner Play
Co-branded
webinar/blog

Owner: PMM

Week 11: Nurture Review
Optimize email cadence

Owner: Demand Gen

Week 12: Qtr Review
Analyze top performing
assets

Owner: All

90-Day Sprint: Quantified Targets

Clear, measurable goals to validate the GTM engine before scaling.

★ NORTH STAR

115%+ NRR TARGET

< 9 Mo CAC PAYBACK

-20% CYCLE TIME

Marketing

MQA Volume

120

Cost per MQA

≤ \$250

MQA to SQL Rate

≥ 25%

ABM Tier 1

Target Accounts

20

Meetings Booked

15

Opportunities

6

Sales Efficiency

Win Rate

28%+

Stage 2 → Close

≤ 70 Days

Pilot Conversion

80%

Pipeline Health

Pipeline Created

\$3.5M

Pipeline Coverage

3.0x

Avg Deal Size

\$150k+

Delivery & CX

First Case Story

By Week 12

CSAT Score

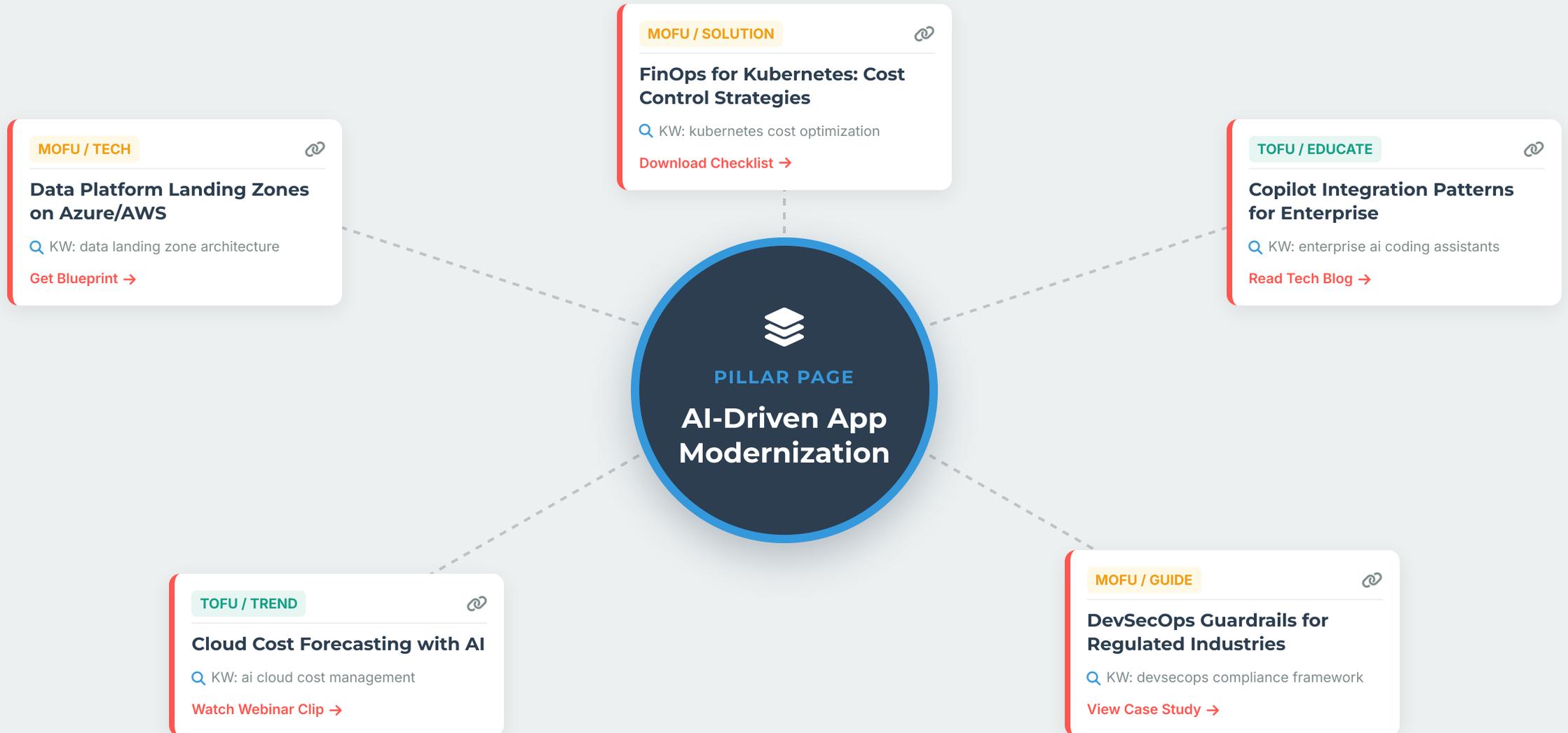
≥ 9.0

NPS Pulse

50+

SEO Topic Cluster Map

Building domain authority through structured pillar and cluster content.



High-Intent Landing Page Checklist

Anatomy of a high-converting conversion point for 2026 buyers.



1. Promise Headline

Tied directly to the specific outcome (e.g., "Reduce Cloud Spend by 30%").



2. Specific Offer Card

Clear scope, timeline, and deliverables visible above the fold.



3. Social Proof & Metrics

Logos, quantified success metrics, and a verifiable client quote.



4. Frictionless CTA

"Book Strategy Session" or "Get Audit" (not "Contact Us").



5. Process Visual

Step-by-step diagram showing "How we work" to reduce risk.



6. Security Badges

SOC2, ISO, HIPAA logos visible near the CTA form.



7. Pricing / FAQs

Starting price range or transparent FAQ addressing cost.



8. Page Performance

Google PSI score > 90 (Mobile/Desktop). Load time < 2s.



9. Schema & UTM

Product/Service schema markup + hidden UTM capture fields.



10. Chat-to-Meeting

Drift/Intercom bot routing qualified traffic directly to calendar.

Quick QA: Pass/Fail

- ✓ Form works & syncs to CRM
- ✓ Mobile responsive check
- ✓ Thank-you page has next step
- ✓ No broken images/links
- ✓ Page loads under 2 seconds

Assets Needed

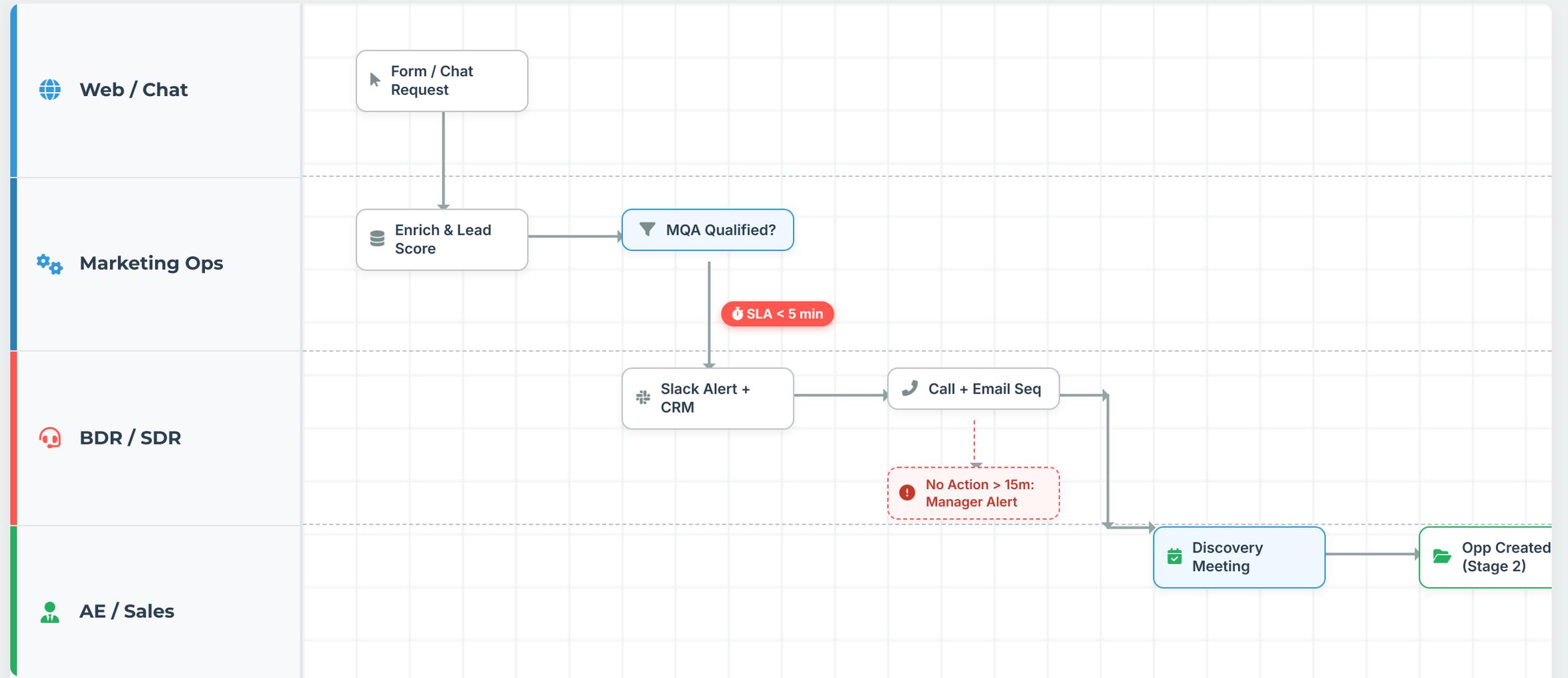
📄 Process Diagram SVG

” Client Testimonial

📺 Explainer Video (Opt)

Speed-to-Lead + Routing SOP

Automated qualification and SLA-driven routing to maximize conversion.



MQA and SQL: Clear Definitions

Defining the handoff: When marketing engagement becomes sales opportunity.

MQA

Marketing Qualified Account

-  **Fit Score ≥ 70 :** Matches ICP firmographics (Industry, Revenue) + Tech Stack signal.
-  **Intent Signal:** 3+ visits to high-intent pages (Pricing, Case Studies) in 14 days.
-  **Buying Committee:** At least 2 active contacts from key roles (IT, Finance, LOB).
-  **Engagement:** Downloaded BOFU asset (Playbook, Assessment) or attended Webinar.



SQL

Sales Qualified Lead (Opportunity)

-  **Discovery Meeting Held:** Problem and impact confirmed with prospect.
-  **MEDDPICC-Lite Gates:** Pain identified, Champion accessible, Timeline established.
-  **Pilot Path:** Mutual agreement on "next step" (Pilot, Scoping, or Workshop).
-  **Exit Criteria:** Converted to Stage 2 (pipeline) or Disqualified/Recycled.

Disqualify Reasons: No budget, No immediate pain, Competitor lock-in (long-term), Misfit tech stack.

Nurture Paths: "Right fit, wrong time" → Newsletter; "Interested, no budget" → Webinar invite.

ABM Research Brief Template

A structured research framework to decode strategic accounts before engagement.



1. Company Snapshot & Financials

Analyze revenue trends, recent M&A, geographical footprint, and strategic priorities from 10-K/Annual Reports and earnings calls.



2. Tech Stack Intelligence

Identify current platforms (CRM, Cloud, ERP) using BuiltWith/StackShare. Look for integration gaps or legacy system signals.



3. Buying Committee Mapping

Map key roles (Champion, Economic Buyer, Blocker) via LinkedIn. Identify recent hires in key leadership roles as triggers.



4. Hypothesized Pains & Value Narrative

Correlate company goals (e.g., "Cut costs by 10%") with your solution (e.g., "FinOps"). Draft a 1:1 value proposition hypothesis.



5. Entry Points & Partner Context

Identify existing partners or mutual connections. Determine the "warmest" path in (referral, event, or direct insight-led email).



Required Outputs



1-Page Account Brief



Org Chart & Influence Map



Messaging Angles & Hooks



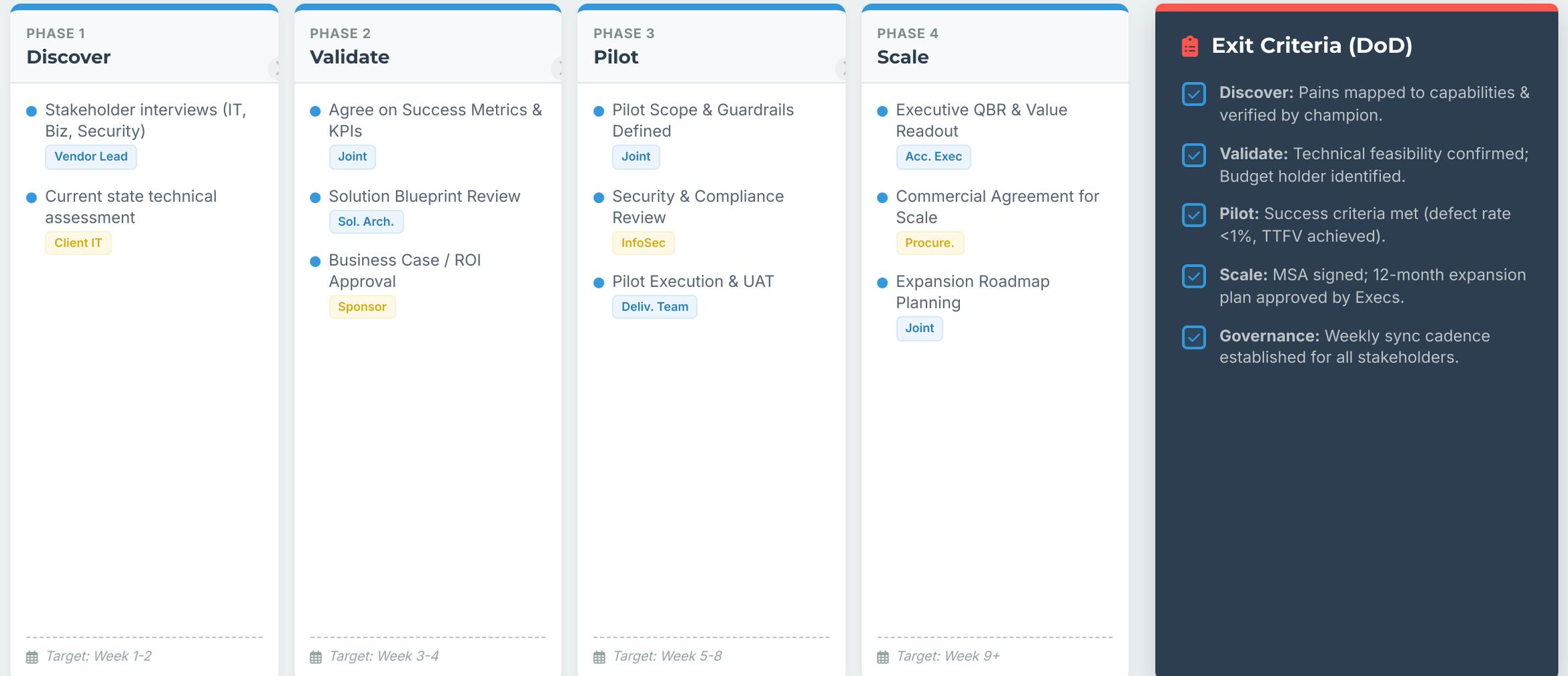
Hypothesis Validation Plan



Relevant Case Study Match

Account Plan + Mutual Action Plan (MAP)

Collaborative timeline to drive deal velocity, alignment, and risk mitigation.



Multithreading Plan (Buying Committee)

Systematically engaging the entire decision unit to de-risk deals.

Exec Sponsor (CEO/CIO)

- 🔥 Pain: Slow innovation, high cost
- 🏆 Win: Market speed + efficiency
- 📄 Proof: ROI case + peer ref
- ▶▶ Next: Exec briefing (Day 7)

BU Owner (LOB Lead)

- 🔥 Pain: Revenue target risk
- 🏆 Win: Product velocity
- 📄 Proof: Time-to-value metrics
- ▶▶ Next: Outcome workshop

IT Owner (VP/Dir Eng)

- 🔥 Pain: Tech debt, talent gap
- 🏆 Win: Modern stack, no ops burden
- 📄 Proof: Arch. diagram + code sample
- ▶▶ Next: Tech deep dive

Security (CISO/SecOps)

- 🔥 Pain: Data leak, compliance breach
- 🏆 Win: Zero-trust, automated audit
- 📄 Proof: SOC2 report + pentest
- ▶▶ Next: Security questionnaire

Finance (CFO/Controller)

- 🔥 Pain: Unpredictable cloud spend
- 🏆 Win: Cost certainty, FinOps
- 📄 Proof: TCO model + payment terms
- ▶▶ Next: Commercial review

Procurement

- 🔥 Pain: Vendor risk, long negotiation
- 🏆 Win: MSA compliance, best price
- 📄 Proof: Standard contract + rate card
- ▶▶ Next: Vendor onboarding

Ops / Change Mgmt

- 🔥 Pain: Disruption to BAU
- 🏆 Win: Smooth rollout, adoption
- 📄 Proof: Training plan + SLA
- ▶▶ Next: Process mapping

+
Add Influencer

🗨️ Engagement Rules

MANDATORY

✓ 3+ Active Threads Before Proposal

🔒 Exec Alignment by Day 21

🔒 Security Review Pre-Close

Discovery Question Bank

Structured inquiry tracks to uncover value drivers, technical constraints, and commercial viability.



Business Outcomes

- ? What specific KPI are you trying to move in the next 6 months?
- ? What happens if you do nothing or delay this by a quarter?
- ? How does this initiative align with your CEO's top 3 priorities?
- ? Who else in the org cares about solving this problem today?
- ? What is the quantifiable cost of the current manual process?
- ? How will you measure "success" for this pilot specifically?



Technical Reality

- ? What are the non-negotiable constraints in your current stack?
- ? Are there any upcoming architectural freezes or migrations?
- ? How do you currently handle data governance and access control?
- ? Who on your team will need to be involved in the technical validation?
- ? What security/compliance frameworks must the solution adhere to?
- ? What failed or stalled regarding this problem in the past?



Risk & Commercial

- ? Do you have a allocated budget, or do we need to build a business case?
- ? What is the typical procurement and legal review timeline?
- ? Who has the final sign-off authority for a pilot vs. full rollout?
- ? Are you open to a shared-risk model tied to outcome metrics?
- ? What is the "go/no-go" criteria for converting the pilot to production?
- ? Are there any competitive contracts or vendor consolidation goals?

📌 Action: Capture answers in a 1-page "Opportunity Charter" and validate with the champion within 48 hours.

ROI Model Structure (Build Once, Reuse)

Standardize value quantification to accelerate sign-offs and justify pricing.

📊 INPUTS & BASELINE DATA

- 🗄️ **Infrastructure Baseline:** Current cloud spend, license fees, and data storage costs.
- 👥 **Operational Costs:** Engineering FTE counts, hourly rates, and current velocity.
- 🔧 **Quality Metrics:** Defect rates, average remediation time (MTTR), and rework %.
- ⚠️ **Incident Impact:** Frequency of downtime and estimated cost per hour of outage.
- 💰 **One-time Costs:** Migration fees, parallel run costs, and training expenses.



📈 OUTPUTS & ANALYSIS

- 🤖 **Projected Savings:** Infra reduction (%), productivity gains (hours returned), and license consolidation.
- 🔄 **Payback Period:** Months to break-even (Target: <9 months for Tier 1, <14 for Tier 2).
- 💰 **Net Present Value (NPV):** 3-year value outlook discounted at corporate cost of capital.
- 📊 **Sensitivity Analysis:** Conservative / Base / Aggressive scenarios based on adoption rates.
- 📄 **Assumptions Log:** Clear list of all variables to build trust with Finance/CFO.

⚙️ MINIMUM VIABLE MODEL PROCESS

- 1 Gather Baseline Data
- 2 Agree on Cost Drivers
- 3 Apply Savings Levers
- 4 Validate with Finance

Proposal Structure & Checklist

Ensure every proposal is outcome-focused, risk-aware, and ready to sign.

 1. Executive Summary (Outcome-First)

 2. Agreed Business Outcomes & Success Metrics

 3. Scope of Work & Inclusions

 4. Exclusions & Key Assumptions

 5. Implementation Plan & Timeline

 6. Team Composition & Roles

 7. Commercials & Risk-Sharing Model

 8. Risk Register & Mitigation Plan

 9. Governance Model & Mutual Action Plan

 10. Acceptance Criteria & Sign-off

Gate Before Sending

- Solution review completed by Tech Lead?
- Mutual Action Plan agreed with champion?
- Draft budget range verbally confirmed?

Red Flags (Do Not Send)

- No identified internal champion.
- Success metrics are vague or missing.
- Procurement-only engagement (no business stakeholder).

Delivery Governance & QBR Checklist

Cadence, controls, and artifacts to ensure outcome realization and transparency.



1. Weekly Execution Sync

Tactical standups to review the backlog, velocity, and burn-down charts. Focus on unblocking the delivery team immediately.



2. Sprint Review & Demo

Demonstrate tangible progress and working deliverables to stakeholders. Secure validation of acceptance criteria (DoD).



3. Monthly/Quarterly QBR

Strategic alignment session focusing on business outcomes, NRR, and roadmap evolution rather than just ticket counting.



4. Governance Artifacts

Maintain a live Outcome Dashboard, RAID Log (Risks, Actions, Issues, Decisions), Change Control Log, and Decision Register.



QBR Standard Agenda



Progress vs. Outcomes



Critical Risks & Blockers



Roadmap Options & Scope



Commercials & Budget



Next 90-Day Objectives



Escalation Rules

- **Red Status > 48 hrs:** Notify Exec Sponsor
- **Scope Creep > 10%:** Change Request (CR)
- **Missed Milestone:** Root Cause Analysis req.

CSAT/NPS + NRR Expansion Playbook

Turning delivery excellence into revenue growth.



| Success Triggers | Target Metrics | CSAT Score | NPS (Promoters) | Net Revenue Retention (NRR) | Cross-Sell Rate |
|------------------|----------------|------------|-----------------|-----------------------------|-----------------|
| | | 9.2+ | 55+ | 115% | 30% |

RevOps Dashboard Specification

Data sources, key fields, and alert thresholds for a unified revenue view.

Marketing & Demand

Traffic Quality GA4 / GSC
High-Intent Page Views vs. Bounce Rate

MQA Volume MAP / CRM
Accounts Reaching Score >70

Cost Efficiency AD PLATFORMS
Cost per MQA (Target: <\$250)

Handoff Speed CRM
Time from MQA to BDR Action

Alert Threshold
If MQA > SQL conversion drops below 15% for 2 weeks.

Sales Performance

Pipeline Health CRM
Total Pipeline Value (Weighted)

Win Rate CRM
% Closed Won (Rolling 90 Days)

Velocity CRM
Avg Cycle Time (Stage 2 to Close)

Deal Value CRM / FINANCE
Average Contract Value (ACV)

Alert Threshold
Pipeline coverage < 3x quota for next quarter.

ABM Engagement

Account Reach LINKEDIN / 6SENSE
% Target Accounts Engaged

Meeting Rate CRM
Meetings Booked per Tier 1 Acct

Opp Creation CRM
New Opps from Tier 1/2 Lists

Influence ATTRIBUTION TOOL
Marketing Influence on Won Deals

Alert Threshold
Zero engagement from >40% of Tier 1 list after 4 weeks.

Delivery & Retention

Value Speed PROJECT MGMT
Time to First Value (TTFV)

Customer Sentiment SURVEY TOOL
CSAT / NPS Score

Retention FINANCE / ERP
Net Revenue Retention (NRR)

Expansion CRM
Upsell Pipeline Generated

Alert Threshold
CSAT < 8.0 or any "Red" project status > 5 days.

OPERATING CADENCE

- Weekly: Pipeline & Forecast Review (Sales + RevOps)
- Monthly: Full Funnel & Cohort Analysis (All Leads)
- Quarterly: Planning & QBRs (Strategy Adjustment)

12-Month GTM Roadmap

A strategic plan to scale operations, expand into verticals, and drive revenue growth.

