



## **Sales Growth Plan**

### **Go-To-Market, Pipeline Building & Sales Process Development**

B2B SaaS | Mid-Market & Enterprise Focus | Multi-Vertical

Version 1.0 | Confidential

## Overview & Context

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This plan outlines a phased approach to building a repeatable, scalable sales process for Klearcomm's B2B SaaS product currently ~\$60k ARR with significant near-term close potential (\$500k–\$1M ARR). The plan is structured in three phases aligned to available resources: founder-led selling now, fractional sales VP support in Q2–Q3, and a fully structured sales organization beyond \$1M ARR.

## Current State Summary

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- ARR: ~\$60k/mo (\$5k MRR), with 5 active proposals that could close at \$50–70k/mo
- Sales team: Founder (strong sales skills) + 2 experienced consultants (domain expertise, informal process)
- Verticals in play: Insurance, Manufacturing, Mortgage/Real Estate, Consumer Services
- Target segment: Mid-market to Enterprise (100–5,000 employee companies)
- Assets in place: Sales deck, demo videos, closed/open demo environment — all need refinement
- Gaps: No CRM, no formal outbound process, no defined ICP or pipeline cadence

## Phased Roadmap at a Glance

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Phase	Focus	Timeline	Revenue Target
Phase 1	Founder-Led: Foundation Building	Now – End of Q2	Close active pipeline → \$500k–\$1M ARR
Phase 2	Fractional Sales VP: Process & GTM	Q3–Q4 (~\$6–8k/mo)	Build pipeline to sustain \$1M–\$3M ARR
Phase 3	Structured Sales Org & Hiring	2027	\$3M ARR and beyond

# Phase 1: Founder-Led — Foundation Building

NOW through End of Q1 | No External Spend Required

## 1.1 — Close the Active Pipeline (Top Priority)

We have 5 active proposals with potential to 10x ARR this quarter. Everything else is secondary until these are closed or formally lost.

### Punch List — Active Deals

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- Assign a clear owner and next step to each of the 5 active proposals
- Set a 'close by' date for each deal — create urgency without being pushy
- Identify the specific decision-maker and economic buyer at each company
- Send a follow-up value summary to each open proposal (ROI, key outcomes, differentiators)
- Schedule a final discovery/demo call with any prospect who hasn't had one
- Prepare and send a revised proposal template with clear pricing tiers and an e-sign option
- Define a 'lost deal' process: document why, add to CRM later, keep the relationship warm

## 1.2 — ICP Definition & Buyer Personas

Before scaling outbound, we need documented clarity on who we are selling to. We will start by using existing customers and pipeline to define this, not hypotheticals.

### Punch List — ICP & Personas

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- Document our 3–5 best-fit customer profiles based on current clients and pipeline (company size, industry, tech stack, pain points)
- Define the buyer persona for each vertical: Insurance, Manufacturing, Mortgage/Real Estate, Consumer Services
- For each persona: title, goals, pains, objections, how they buy, what they read
- Identify the economic buyer vs. champion vs. end user for a typical enterprise deal
- Rank our 4 verticals by: deal velocity, ACV potential, ease of reference selling, and fit with product
- Choose 1–2 priority verticals for initial outbound focus — lets not try to pursue all four equally

## 1.3 – CRM Setup (Lightweight, Low Cost)

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Lets establish a CRM before outbound begins. HubSpot Free or Pipedrive Essentials are options for us at this stage – lets not build this in spreadsheets.

### Punch List – CRM

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- Select and deploy a CRM (recommended: HubSpot Free to start, upgrade as needed)
- Load all current prospects, leads, and clients into the CRM with stage, owner, ARR value, and close date
- Define our pipeline stages: Lead → Qualified → Demo → Proposal → Negotiation → Closed Won / Lost
- Set up deal properties specific to your verticals and ICP
- Create a simple weekly pipeline review ritual: every Monday, review all open deals with the team
- Document a standard lead entry process so all three sellers (founder + 2 consultants) log consistently

## 1.4 – Sales Asset Refinement

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Our deck, demos, and videos are in place but need sharpening. Refine these now while actively selling so we can identify what resonates.

### Punch List – Sales Deck

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- Audit the current deck: does the “first” slide state the problem clearly and use subsequent slide to state our solution?
- Add a 'social proof' slide with logos, outcomes, or early testimonials from existing clients
- Create vertical-specific versions of the deck (or at least a vertical-specific slide) for Insurance, Manufacturing, Mortgage, and Consumer Services
- Ensure pricing is clear and easy to understand — if it requires a call to explain, simplify it
- Add a clear call-to-action slide at the end (next step, trial, demo request)

### Punch List – Demo Environment

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- Review the closed demo: does it follow a problem → solution → outcome narrative?
- Ensure the open (self-serve) demo is frictionless — test the flow as a first-time user
- Create 1 demo script per top vertical that highlights the most relevant use cases
- Record a short (1-2 min) 'leave behind' demo video per vertical for async sharing with champions

## 1.5 — Outbound Foundation (Manual, Founder-Led)

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We are not going to invest in outbound tooling yet. At this stage, we should be running a simple, manual outbound process to learn what messaging converts.

### Punch List — Outbound Process

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- Build a target account list of 50–100 companies per priority vertical using LinkedIn Sales Navigator or Apollo (free tier)
- Define a simple 5-touch outbound sequence: Email 1 (value) → LinkedIn connect → Email 2 (case study) → Call → Email 3 (breakup)
- Write 3 outbound email templates (1 per top vertical) — keep to 5 sentences or fewer
- Run outbound manually for 4–6 weeks and track response rates before automating anything
- Log all outbound activity in the CRM
- Set a weekly outbound quota per seller: e.g., 20 new contacts touched per week per person

## Phase 2: Fractional Sales VP — GTM Build-Out

Q2-Q3 | ~\$6,000-\$8,000/month | Individual or part-time agency engagement

### 2.1 — Fractional VP Scope & Selection

We seek a fractional sales VP for the sub-\$1M ARR stage. This will likely be an individual operator with hands-on startup GTM experience, as opposed to a large agency. We are looking for someone who has taken a similar B2B SaaS company from \$500k to \$2M ARR in a multi-vertical or enterprise motion.

#### Punch List — Hiring the Fractional VP

- Define the scope before engaging: GTM strategy, pipeline process, playbook build, coaching — not direct selling (the founder still owns the deal)
- Evaluate candidates on: startup-stage experience (not Fortune 500 only), multi-vertical GTM, hands-on operator vs. advisor
- Request references from founders they've worked with, not just big company logos
- Structure the engagement: 2-3 days/week, \$6-8k/mo, 3-month initial term with monthly review
- Define success metrics upfront: pipeline volume, conversion rates, playbook delivery, ramp of consultant reps

### 2.2 — Go-To-Market Plan Development

This is the primary deliverable from the fractional VP engagement in month one. It should answer: who we sell to, how we reach them, what we say, and how we measure success.

#### Punch List — GTM Plan

- Finalize ICP and persona documentation from Phase 1 — the fractional VP should pressure-test and refine
- Select 2 primary verticals for concentrated GTM investment in Q2
- Define TAM/SAM for each priority vertical (rough estimate is fine — but directional clarity matters)
- Document the ideal sales motion: outbound-led, inbound-assisted, or partner/channel for each vertical
- Define ACV targets and deal size ranges by vertical and company size band
- Map the buyer journey for each vertical: awareness → consideration → decision → onboarding
- Identify top 3 competitive alternatives per vertical and document your differentiation
- Set 90-day GTM goals: pipeline generated, meetings booked, proposals sent, ARR closed

## 2.3 — Pipeline Building Infrastructure

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By Phase 2 we should be ready to build repeatable pipeline. The fractional VP should architect the process; the team executes it.

### Punch List — Pipeline Infrastructure

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- Upgrade CRM to a paid tier and configure reporting dashboards: pipeline by stage, velocity, and vertical
- Implement a sequencing tool (Apollo, Outreach, or HubSpot Sequences) for scaled outbound
- Build a target account list of 500–1,000 companies per vertical using defined ICP criteria
- Create a LinkedIn + email multi-touch cadence (7–10 touches over 3–4 weeks) per vertical
- Launch an inbound lead capture: basic gated content (use case brief, ROI calculator, or benchmark report) per vertical
- Establish a referral/introduction ask process for closed customers — warm intros convert 3–5x better than cold outbound
- Define SLAs: how quickly do leads get followed up, how often are stale deals reviewed, when is a deal marked lost

## 2.4 — Sales Playbook

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The playbook is the single most important deliverable from the fractional VP engagement. It should be a living document the current team and future hires can operate from independently.

### Punch List — Playbook Contents

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- Company and product overview (2 pages max, written for a new hire)
- ICP and persona cards (one per vertical)
- Outbound messaging library: subject lines, email templates, LinkedIn templates by vertical and persona
- Discovery call guide: the 10 questions to ask, what to listen for, how to qualify
- Demo script and flow per vertical
- Objection handling guide (top 10 objections with recommended responses)
- Proposal and pricing guidelines: what's standard, what's negotiable, what requires founder approval
- Pipeline stage definitions and exit criteria
- Competitive battlecards (1 per main alternative/competitor)
- Onboarding and handoff process to ensure a smooth transition from sale to delivery

## 2.5 — Consultant Rep Development

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Our current sales team most valuable asset is the experience in the space as consultants — they know the verticals. The gap is sales process and structured activity. Phase 2 is about turning their domain credibility into repeatable, measurable selling.

### Punch List — Rep Development

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- Have each consultant shadow the FSVP and/or CEO on 3–5 deals to observe and align on sales narrative
- Assign each consultant a primary vertical or territory to own
- Run weekly 30-min deal review sessions: pipeline status, blockers, next actions
- Establish a monthly 1:1 cadence between fractional VP and each consultant
- Track individual metrics: calls made, emails sent, meetings booked, proposals out — not just closed revenue
- Provide the playbook and demo scripts and hold reps accountable to using them

## Phase 3: Structured Sales Organization

Q4 and beyond | \$1M+ ARR | First full-time sales hire + possible agency GTM support

Phase 3 is not fully prescribed here because it depends on what we learn in Phases 1 and 2. The following are guideposts and prerequisites for us to have in place before entering this phase.

### 3.1 — Prerequisites Before Scaling

- Repeatable close rate of 25%+ on qualified demos
- At least 3 reference customers per priority vertical
- A working outbound cadence generating 10+ qualified meetings per month
- A fully documented and tested sales playbook
- CRM data sufficient to calculate average sales cycle, ACV, and pipeline coverage ratio

### 3.2 — First Full-Time Sales Hire

- Define the role: Account Executive (quota-carrying), SDR (outbound pipeline), or Sales Manager
- At sub-\$2M ARR, we will need to hire a quota-carrying AE who can also prospect — not a specialist SDR
- Compensation structure: base + commission, OTE at 4–5x base for AE roles
- Onboarding plan: 30/60/90-day ramp using the Phase 2 playbook

### 3.3 — Channel & Partner Strategy

- Identify 2–3 potential integration or referral partners per vertical (software vendors, consultants, associations)
- Structure a simple referral program: revenue share or flat fee per closed deal
- Evaluate whether a value-added reseller (VAR) or channel model makes sense for any vertical

### Key Metrics & Targets by Phase

Metric	Phase 1 Target	Phase 2 Target	Phase 3 Target
ARR	\$500k–\$1M	\$1M–\$2M	\$3M+
Active Pipeline (Deals)	5–10	15–25	30+
Qualified Meetings/Month	5–10	15–25	30+
Demo-to-Proposal Rate	60%+	65%+	70%+
Proposal-to-Close Rate	20%+	25%+	30%+
Outbound Contacts/Week	20 (manual)	50–100 (sequenced)	100+ (automated)
Avg Deal Size (ACV)	\$12k–\$60k	\$24k–\$120k	\$50k–\$250k

## Notes, Assumptions & Open Items

### Open Items to Resolve

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- Confirm CRM selection and assign implementation owner
- Prioritize top 2 verticals for Q1 focus — Founder / CEO decision needed
- Define pricing tiers formally — current pricing clarity unknown
- Identify fractional VP candidates — begin outreach in Q1 once pipeline is advanced
- Align consultants on new process expectations — change management conversation needed

### Assumptions

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- Founder/CEO continues to own or closely supervise all active deals through close
- The two team members will work together to close and implement deals to grow from Phase I to Phase II and have capacity to handle the increased activity
- CRM and sequencing tool combined cost will be under \$500/mo in Phase 1 and under \$1,500/mo in Phase 2
- Fractional VP will be sourced within 60–90 days, contingent on pipeline closing as projected