



FOR PRE-SEED AND SEED ENTERPRISE AI COMPANIES

The Pipeline Playbook.

Marketing's one job is qualified leads. This is how to build the engine that produces them, pays for them and gets others to sell.

Works alongside the 2027 Commercial Strategy Workbook. The workbook is the plan; this playbook fills the pipeline that feeds it.

PART 1

The rule

Two functions, one metric, the lead contract, what the next investor tests.

PART 2

The engine

Seven things to build, in order, each with a done-when test.

PART 3

Running it

The weekly rhythm, who does the work, the first hire, the stack, the first 90 days.

PART 4

Getting others to sell

Partners who already hold the buyer's trust, and how to keep it.

BUILT AT

Sure Valley Ventures · enterprise AI, UK and Ireland

SHARED BY

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USE

Share it with your board, your investors and the people you hire

MARKETING
makes qualified leads



VALIDATED LEADS
counted when sales accepts



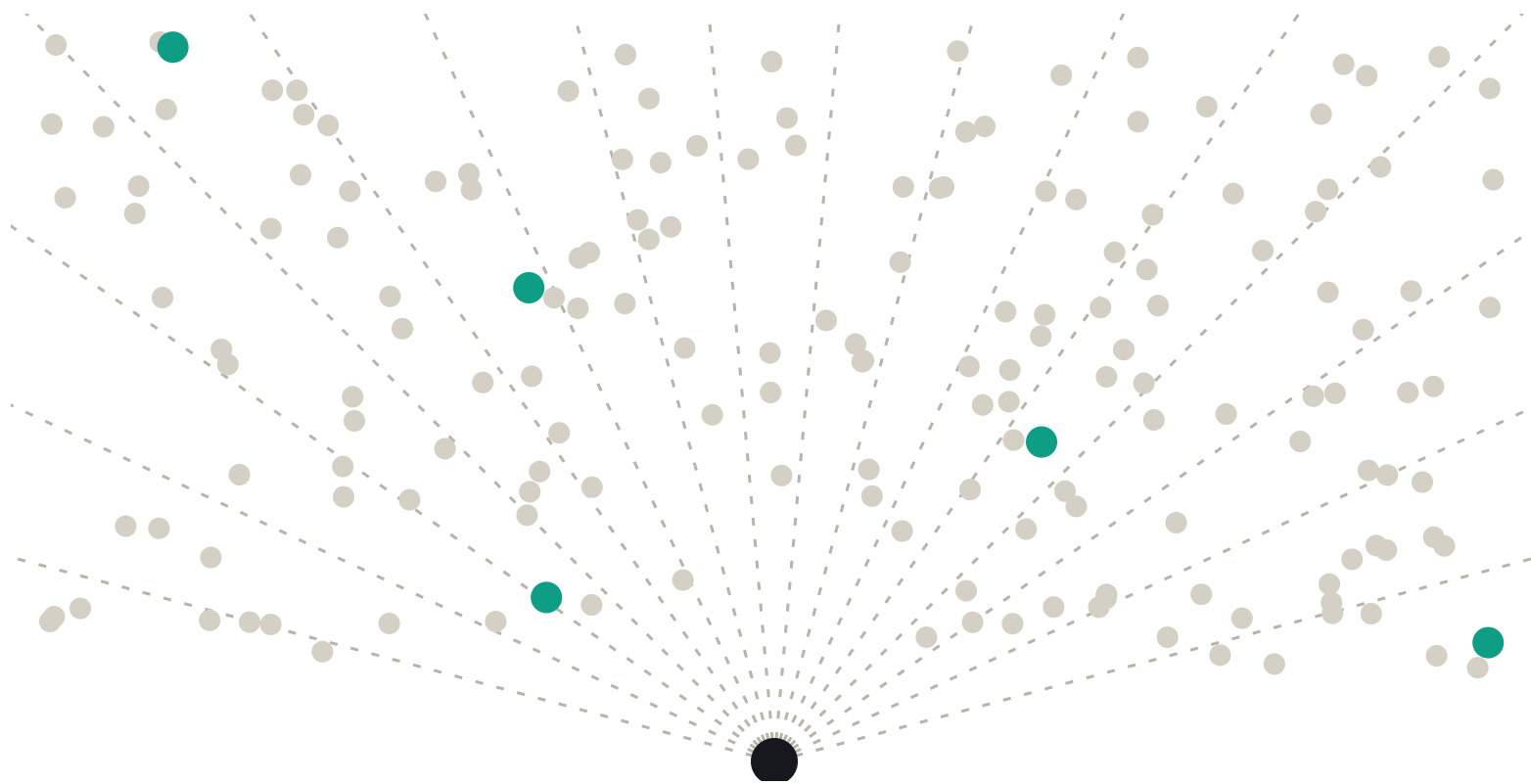
SALES
makes revenue

BILLED AND COLLECTED · RECURRING

Aim at everyone and you win no one. Aim at one market and win it again and again.

Same people, same hours, same budget. **Only the aim changes.** Grey and orange: accounts you work. Teal: customers won, linked by the references they give.

Everyone "any company that could use AI"

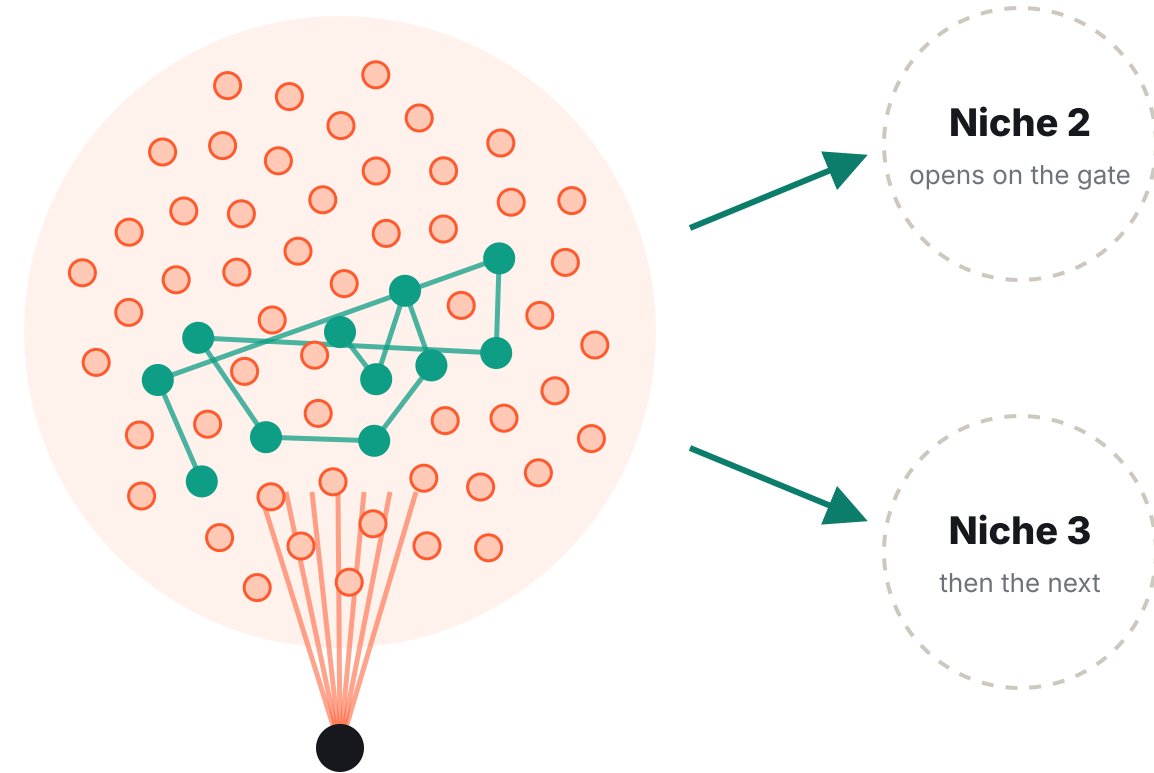


A message for no one. Generic copy, low replies, nothing sharpens week to week.

Wins that do not connect. Each customer is a one-off; no reference transfers to the next.

No learning. Every cycle starts from zero; the pipeline is a list of strangers.

One beachhead vertical × size × geography × trigger



One message that sharpens every week, because every buyer has the same problem.

References that transfer. Each win makes the next one easier: buyers in a niche talk to each other.

Expand sideways into the next niche once the first is won, on evidence.

Six things you will hear, and our answer to each.

"Enterprise is brand-led."

Big buyers want a name they can defend to procurement. That is proof: a case study with numbers, a reference call, a trust pack. All of it is marketing's work, measured by the deals it moves.

"Nine-month cycles; you cannot judge marketing monthly."

Sales is judged on quarterly conversion because the cycle is long. The lead is the leading indicator and arrives at the start of it. Engaged in 30 days and qualified in 60 sit inside the cycle on purpose.

"We are too early for marketing."

You are never too early for leads. Pre-seed needs problem interviews and design partners; seed needs qualified conversations. Same engine, and it still has a number.

"The product sells itself."

Our view: you cannot run an EMEA enterprise motion on product-led growth. OpenView found 47% of PLG companies had a sales team before \$1m ARR and 73% by \$1–5m. Pricing is moving from seats to work done, so a licence is no longer a wedge.

"We will get an agency."

An agency can build a list, design proof assets and run event logistics under your messaging. It cannot own the ICP, the messaging, validation or the qualification call. No retainer without a lead number.

"Our best customers came from our network."

They usually do, and that is exactly the dependency the next investor will test. The network is finite and not for sale. Keep those leads on their own line and build the engine beside them.

AT PRE-SEED

The same engine produces problem interviews and design partners; the counted lead is an ICP-matching conversation with a named buyer; the ACV floor is a hypothesis to test. Everything else applies as written.

The next investor tests the machinery, **not just the revenue.**

From our experience of seed and Series A rounds, the questions that bear on lead generation. Tick what you can evidence today; the gaps are the plan.

RAISING SEED

- ☐ The ICP is written down and at least half of design partners and pipeline match it
- ☐ A trigger is documented and two or more references cite it in their own words
- ☐ A competitive matrix names three or more alternatives, including build-it-yourself
- ☐ Qualified conversations are logged in a CRM and growing month on month
- ☐ A written sales process with stage definitions and conversion rates; five or more deals through it
- ☐ A lead engine produces validated leads every month from beyond the founders' network

RAISING SERIES A

- ☐ 80% or more of the last twelve months' new ARR came from the ICP
- ☐ Trigger cited by five or more references; a budget owner identified in 80% of closed deals
- ☐ Win and loss recorded for ten or more deals; win rate 30%+ against named competitors
- ☐ A meaningful share of new ARR closed by non-founders; CAC payback inside 18 months
- ☐ Cycle length and win rate stable; loss reasons categorised
- ☐ ARR at about £1m as the entry ticket, around £2m the median; the engine at quota and repeating in a second niche

READ AS NO ENGINE

no written ICP, or one changed twice in a year · every customer traceable to a founder's network · revenue counted before a signature · pilots that do not convert · one customer over half of revenue

PART 1

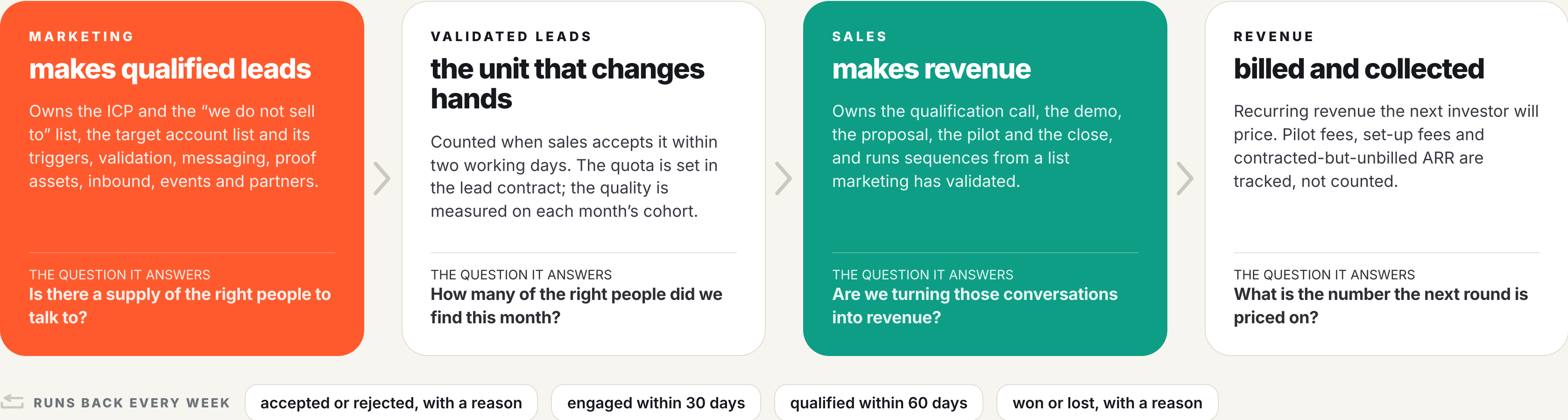
The rule.

Every software company has two revenue functions whether or not anyone holds the title. Marketing produces qualified leads; sales turns them into revenue. Marketing is judged on the number and quality of its leads, and on nothing else. Its spend is budgeted, managed and tracked to what each customer cost.

6 Two functions, one engine 7-8 The one metric · not a marketing metric 9 What marketing may still do 10 The lead contract 11 A lead contract, filled in
12 What a customer costs 13-25 Where leads come from

Two functions. One revenue engine. Two numbers.

Separated by output, not headcount. In a four-person company the CEO holds both; the scoreboard still shows two numbers every week, because they answer different questions.



The sentence to pin on the wall: Marketing makes qualified leads. Sales makes revenue. Neither gets credit for the other’s number, and neither gets to blame the other without a reason recorded in the CRM.

Marketing is judged on **counted leads**, and their quality. Nothing else.

Two halves, defined so neither can be gamed alone. A quota met with leads sales rejects, or that never engage, is not met.

THE NUMBER

Counted leads per month

A validated lead marketing has entered in the CRM that sales has **accepted within two working days**; plus any validated inbound, event, partner or referral lead that arrives with a conversation already booked.

The quota is set in the lead contract from the reverse funnel and reset each quarter. Founder-network leads sit on their own line, never inside this one.

THE QUALITY · ON EACH MONTH'S COHORT

1 **Acceptance rate**
accepted ÷ delivered

2 **Engaged rate**
reached a booked qualification call within 30 days of first touch

3 **Qualified rate**
passed the sales qualification call within 60 days

4 **Cost per counted lead**
by channel, against the cap in the contract

Thresholds are set by source: an inbound or referral lead should convert at several times the rate of an outbound one.

Published every Friday by 16:00, to the whole company. Read, not presented, at the Monday lead meeting. A lead number only marketing can see is a lead number nobody will believe.

Twelve numbers you will be shown. **None of them is the job.**

Each will be offered as evidence that marketing is working. Record them if you like; never judge marketing on them.

✗ **Impressions and reach**

Nobody has ever bought an impression.

✗ **Followers and connections**

Rises with posting volume, not with buyers.

✗ **Website traffic**

Traffic from the wrong people is a cost.

✗ **Subscribers and downloads**

A download is a click, not a decision.

✗ **Event attendees and badge scans**

A scan is a stranger with a lanyard.

✗ **Awards, press, share of voice**

Permitted as a means with a lead hypothesis; never the output.

✗ **"Brand awareness"**

Unmeasurable at seed; buyers are moved by proof, not awareness.

✗ **Leads sales rejected**

A rejection is a quality signal on marketing, not a volume credit.

✗ **Leads below the ACV floor**

They cost the same demo, proposal and pilot, and cannot pay for them.

✗ **Leads outside the ICP**

The fastest way to lose a beachhead.

✗ **Posts, emails sent, content published**

Activity: an input on the channel test sheet, never the output.

✗ **Pipeline "influenced"**

Attribution by assertion. Every lead carries one source.

The test for any number: does it tell you how many of the right people are in the CRM this month, and how many of them sales accepted? If not, it is an input or a vanity.

Brand, content, events and PR are allowed. **As means.**

Every activity passes the same four-part test before it gets time or money. An activity that cannot show leads by its review date stops.

01 A lead hypothesis

"This produces validated leads because..." written down.

02 A cost

Money and hours, before it starts.

03 A review date

Four weeks for PR, a quarter for content, after each event.

04 A lead number

The counted leads it will be judged on at that date.

A HYPOTHESIS THAT PASSES, BY ACTIVITY

Content	One piece a week on the trigger and the outcome. Measured by the leads sourced to it and the lift in reply rates.
Events	Four to six a year where the ICP is, with meetings booked before the event. No stand without a meeting plan.
Partners	Introducers, consultancies, complementary vendors. Measured by introductions that validate.
PR	A story timed to the trigger. Measured by validated inbound in the following four weeks.
Community	A group of the user persona that produces introductions to the economic buyer. Measured by those introductions.

PROOF ASSETS · THE EXCEPTION THAT PROVES THE RULE

Four things marketing builds are measured by the deals they move, not the leads they source. They are infrastructure for conversion.

- ✓ **The one-page value story**
used in every first conversation
- ✓ **Case studies with numbers**
even from pilots; cited in proposals
- ✓ **The trust pack**
security, architecture, sub-processors, insurance, terms
- ✓ **The business-case calculator**
sent within 24 hours of a demo

One page, signed by the CEO, that ends three arguments.

“That was not a real lead.” “Sales never followed it up.” “We need more leads”, with no number attached. The contract fixes what a lead is, how many are owed, and what each side owes the other.

Parties	marketing owner, sales owner, CEO; signed and dated
ICP and disqualifiers	the ICP in one line; the “we do not sell to” list
ACV floor	annual contracted basis; pilot and set-up fees excluded
Definitions	validated lead; counted lead; word for word
Quota and thresholds	monthly, by niche and by source; acceptance, engaged and qualified rates; cost cap
Hand-off	through the CRM only; a lead that arrives any other way does not exist
Sales’ service level	accept or reject within two working days with a reason from the list; sequenced or booked within five
Marketing’s service level	nothing enters the CRM as validated unless it meets the definition
Rejection reasons	not ICP · below floor · no trigger · wrong role · duplicate · disqualified · other, with a note
Disputes, scoreboard, review	settled on Monday by the CEO in five minutes; Friday 16:00; re-signed when the ICP or the floor changes

No dumping.

Marketing may not fill the CRM with names to hit a number. A lead that fails validation and is entered anyway is a breach of the contract, not a lead, and counts against the acceptance rate.

No hoarding.

Sales may not sit on an accepted lead. If sales misses its service level in a month, marketing’s quota for that month is void: nobody can be judged on leads nobody worked. Written down so nobody has to be brave on the day.

Quoinstone's lead contract. Every blank filled in.

The example company's contract for its first quarter, written from its workbook. Copy the ten clauses; replace every number with one from your own model.

Lead contract · Quoinstone Ltd

Q1 2027 · in force 04/01/2027 · reset at the review on 31/03/2027

EXAMPLE · FICTIONAL COMPANY

01 Parties and term

Lead generation: the CEO, until the SDR starts in April; then the SDR. Sales: the CEO. Runs 04/01 to 31/03/2027.

02 ICP and beachhead

UK main contractors, £50m–£500m turnover, 200+ subcontractors. Buyer: commercial director or head of procurement. User: pre-construction or commercial manager. Q1: England only, on a new framework award or a failed supply-chain audit.

03 We do not sell to

Housebuilders with no subcontract tendering · contractors below £20m turnover · public-sector clients directly · any buyer who wants an unpaid pilot.

04 ACV floor

£25,000 a year, contracted; list price £45,000. The £6,750 pilot fee and any set-up charge do not count towards it.

05 Validated lead

All six, or it is not entered: ICP match on segment, size and geography; named buyer and user; trigger under 90 days old; estimated ACV of £25k or more; no disqualifier; source recorded.

06 Quota

100 validated leads a week from week 3, about 430 a month, all in the beachhead. Counted when sales accepts within two working days. Founder-network leads on their own line.

07 Quality thresholds

On each month's cohort. Accepted: 90% or more. Engaged: 5% outbound, 50% inbound, event, partner and referral. Qualified: 3.5% and 35%. Cost per counted lead: £15 outbound, £150 events and partners.

08 Hand-off and service levels

Through Attio only. Accept or reject in two working days, with a reason; sequenced or call booked in five. The 25-minute qualification call books the demo when all six fields are met.

09 Rejection reasons

Not ICP · below floor · no trigger · wrong role · duplicate · disqualified · other, with a note. The first two count against lead generation.

10 Scoreboard, disputes, misses

Five lines, Fridays by 16:00, to the whole company. Disputes: Monday, the CEO, five minutes. Under 70% of quota two months running: diagnose; three months: change the plan, the supplier or the person. A missed sales service level voids that month's quota.

A. Okafor

CEO, for lead generation and for sales · 04/01/2027

SDR, countersigned on the first day

Re-signed whenever the ICP or the floor changes.

The thresholds come from the funnel.

430 leads a month at 5% engaged is 21 booked calls; at 3.5% qualified, 15. That is the plan's 20 meetings and 14 demos a month. Below it, the year's 18 deals are gone before anyone notices.

One person on both sides? Sign it anyway.

It keeps two numbers apart that one person would blur, and it is the standard the SDR inherits on day one.

Illustrative.

Thresholds and caps are worked from Quoinstone's own plan and budget, not from benchmarks. Yours come from your model.

Sales needs marketing money. Budget it, manage it, track it.

Leads are paid for, in cash or in founder hours. Spend that is budgeted, owned and traced to the customer it won gives you a customer acquisition cost. If you cannot say what a customer cost to win, the commercial process has a hole in it, and the next investor will find it before you do.

1

Budgeted

Before the quarter, not found after it.

A line per quarter: people, tools, programmes

Founder time counted at the share of salary spent selling

Approved by the CEO; reviewed at the quarterly reset

THE TEST

The quarter's spend is in a sheet before day one.

2

Managed

Every pound has an owner and a cap.

One owner per budget line, by name

A cost-per-counted-lead cap in the lead contract

Every channel test has a fixed budget and a kill date

THE TEST

Name the owner of any line in five seconds.

3

Tracked

Every customer has a price.

One source on every deal, from first touch

Spend booked by channel each month, from the ledger

CAC at month end: blended, and by channel

THE TEST

Pick any customer. Say what it cost to win.

EXAMPLE · FICTIONAL COMPANY

Quoinstone's 2027 plan

Commercial spend	£181,848	people £127,800 (founder time £42,000) · tools £12,048 · programmes £42,000
÷ customers won	18	at the £45,000 target ACV
= CAC	£10,103	what each new customer costs to win
Payback	4.5 months	÷ £2,250 gross profit a month (£45k × 60% ÷ 12). Guardrail: 18 or less
Spend per £1 of new ARR	£0.24	÷ £771,000 new-logo ARR. Guardrail: under £1.00

THE FAILURE

A customer nobody can price: no source on the deal, founder hours left out, tools on a personal card, events filed as travel. Each one makes CAC look lower than it is. Marketing owns the cost per counted lead; the CEO owns the CAC.

Twelve places leads come from. Run two at a time.

Every source below can feed the engine; none of them is the job. Pick two that reach your beachhead buyer, test them for six weeks (slide 34), and judge each on cost per counted lead.

● OUTBOUND slide 14 Trigger-based outbound Named accounts, worked by sequence first lead weeks cost £	● EVENTS slide 15 Trade shows and conferences Booked meetings with buyers in one hall first lead one event cost £££	● EVENTS slide 16 Roundtables and dinners Eight to twelve buyers, one host customer first lead one evening cost ££	● EVENTS slide 17 Webinars Registrants who stayed and asked first lead 3–4 weeks cost £
● CONTENT slide 18 Original research and white papers Downloads from your ICP, with a reason first lead 1–2 months cost ££	● CONTENT slide 19 Calculators, templates, assessments High-intent hand-raisers first lead 1 month cost £	● CONTENT slide 20 Website, search and AI answers Demo requests from people already looking first lead 3–6 months cost ££	● CONTENT slide 21 LinkedIn, founder-led Conversations with buyers who follow you first lead 2–3 months cost time
● NETWORK slide 22 Customer referrals The warmest lead you will ever get first lead at go-live cost free	● NETWORK slide 23 Partners and introducers Introductions on borrowed trust first lead a quarter cost fee	● NETWORK slide 24 Communities and industry bodies Standing in the room your buyer trusts first lead a quarter cost £	● NETWORK slide 25 PR, awards and speaking Proof and a reason to call first lead a quarter cost £

The same test for every source

A scan, a registration, a download or a follower is not a lead. It becomes one when it passes the six-part validation; it counts when sales accepts it. Each source gets its own line on the Friday scoreboard: counted leads, cost per counted lead, engaged rate. Time to first lead and cost are our planning view at seed, not benchmarks.

Switch it on this week. You control the dial.

Outbound reaches named buyers in your beachhead when something has just changed for them. Part 2 builds the machinery; this is the one-page version, with the slide where each piece lives.

1

Build the list
Named accounts in the beachhead, tiered; Tier 1 worked by hand. Slide 30.

2

Attach a trigger
A framework award, a failed audit, a new hire in the buyer role, a regulation deadline. No trigger, no sequence.

3

Validate
All six parts or it is not entered: ICP, named buyer and user, trigger, ACV, no disqualifier, source. Slide 31.

4

Sequence
Five steps over fourteen days: email; a LinkedIn connection by hand, with a note; email with the case study; a call; a final email.

5

Book and hand off
The 25-minute qualification call books the demo when the six fields are met. Slide 37.

THE FIRST LINE

Names the trigger, then the problem in the buyer's numbers, one proof, one ask. "Congratulations on the framework award: 200 tender returns in the first quarter is usually where the spreadsheets break. A contractor your size cut review time from 14 hours to 3 per pack. Worth 20 minutes next week?"

CAPACITY AND THE RULES

Three secondary domains and six mailboxes at about 40 a day give roughly 1,100 contacts a week of capacity (workbook B2). LinkedIn by hand only: automation breaches its terms. Before the first send, the rules by market on slide 35. Test it like any channel: slide 34.

DO THIS NOW

1

Pick three triggers for your beachhead
CEO · this week

Done when: three dated signals, each with where you will find it

2

Write the first lines
Marketing owner · week 2

Done when: one opening per trigger, each naming the trigger and one proof

3

Load the first 100 validated leads
Marketing owner · week 3

Done when: 100 leads in sequence, every one with a trigger under 90 days old

4

Read replies daily for two weeks
CEO · weeks 3-4

Done when: every reply answered the same day; first calls booked

Arrive with meetings booked. Leave with leads, not scans.

An event is three weeks of work around two days on a stand. Most of the value is booked before you travel and lost in the week after you get back.

PICK THE EVENT

Your buyer is there
Last year's attendee list, by job title. Ask three customers which events they go to.

Niche beats big
A small stand where your beachhead meets beats a big one in a general AI hall.

A slot beats a stand
A talk, a panel or a roundtable puts you in front of buyers who chose to come.

Cost it in full
Stand, travel, hotel and the days lost. Divide by the meetings you expect.

Before six weeks to one

- 1 Get the exhibitor and attendee lists; mark the 40 target accounts going
- 2 Message each named buyer: twenty minutes, at the stand or over coffee on day two
- 3 Target fifteen meetings booked before you travel
- 4 Book a dinner for eight to ten buyers on the first night, a customer as host
- 5 Post the talk or the stand number on LinkedIn the week before

On the day two days

- 1 Two people on the stand, standing; one walking to target accounts' stands
- 2 Three questions on every scan: their role, the problem or trigger, the timing
- 3 A three-minute story in the buyer's numbers, not a product tour
- 4 No scanning for swag: a badge without a conversation is not a lead
- 5 Fifteen-minute debrief each evening: who, what, next step

After within 48 hours

- 1 Every conversation in the CRM within 24 hours, with the notes
- 2 Personal follow-up within 48 hours that names what was discussed
- 3 Validate each one; outside the ICP goes to the newsletter, not the pipeline
- 4 Thank the dinner guests; offer the host customer the attendee list
- 5 Cost per counted lead and meetings within 30 days decide whether you go again

DO THIS NOW

1 **Name the two events your buyer attends**
Marketing owner · this month
Done when: two events, each checked against last year's attendee titles

2 **Book fifteen meetings before you travel**
Marketing owner and CEO · three weeks before
Done when: fifteen calendar invites accepted

3 **Put the three questions on the scanner**
Marketing owner · the week before
Done when: every scan carries role, problem and timing

4 **Follow up inside 48 hours**
Whoever met them · after the event
Done when: every conversation in the CRM with a personal next step

Ten buyers, one table, one question. **Never a pitch.**

The highest-trust event you can run, and the cheapest per conversation. A customer hosts, buyers talk to each other, and you are the reason they met.

1

Pick the question
One problem your beachhead argues about: “Who owns supply-chain risk when a subcontractor fails?”

2

Recruit a host customer
They open with their story and sign the invitation. Their name fills the room.

3

Invite 25 to seat 10
Named buyers, personal invitations from the host and the CEO, six weeks out; a reminder at one week; confirm at 48 hours.

4

Run it in 90 minutes
Chatham House Rule. Host opens for ten minutes; three questions sent in advance; you facilitate. No slides.

5

Write it up
A one-page summary of what was said, without names, within two days. Guests see it first.

6

Follow up by hand
A personal note to each guest with the summary; offer 20 minutes on what they raised.

THE INVITATION, AS SENT

“I am hosting ten commercial directors for dinner on 12 March to compare how we handle subcontractor risk on new frameworks. No presentations; Chatham House Rule. I would value your view at the table.”
Signed by the host customer.

VARIANTS AND THE MEASURE

A breakfast briefing, a site visit at the host’s office, or a dinner the night before an event your buyers already attend. Measure meetings booked within 30 days per guest; the host gets first sight of the summary.

DO THIS NOW

1

Choose the question and the host
CEO · this month

Done when: one question; one customer agreed to host

2

Send 25 personal invitations
CEO and the host · six weeks before

Done when: 25 named buyers invited; ten confirmed by week five

3

Write the summary within two days
Marketing owner · after the dinner

Done when: one page, no names, sent to guests first

4

Follow up every guest by hand
CEO · within a week

Done when: a personal note to each; meetings logged in the CRM

One problem, one co-host, 45 minutes. Polls qualify.

A webinar earns leads when the subject is the buyer’s problem and someone they trust is on screen beside you. Run it to a fixed clock, and work the follow-up in order of intent.

THE RUNNING ORDER · 45 MINUTES

0–5 min

Welcome; poll 1: how do you do this today?

5–15 min

The co-host’s story, in their numbers

15–30 min

Your data and the method, not the product

30–42 min

Questions, answered live

42–45 min

One slide on you; poll 2: when will you change it?

Three weeks before

Title with a number

“Assessing 200 tender returns in a week”, never “Introducing our platform”

A co-host

A customer or partner; their list receives the invitation from them

Promotion

Four-field page; a sequence step, three posts, the partner’s email; reminders a week, a day and an hour out

On the day

Two polls

How they do it today; when they plan to change it. The answers qualify

Questions captured

Every question logged with the name; the CEO answers live

A producer

Someone other than the speaker runs the platform, the chat and the clock

Within 24 hours

Recording to everyone

Attendees and no-shows; most registrants come back for it

Follow up in order

Poll 2 “this quarter”, then questioners, then attendees, then registrants

Validate first

A registrant becomes a lead only when they pass the six-part check

57%

of B2B webinar registrants attend, on average (ON24 webinar benchmarks, 2025, platform data for 2024).

Plan the room on half your registrations; plan the follow-up on all of them.

DO THIS NOW

1 Pick the problem and the co-host

Marketing owner · this month

Done when: a title with a number; a co-host confirmed

2 Open registration three weeks out

Marketing owner · week 1 of 3

Done when: page live; three reminders and both polls scheduled

3 Rehearse to the clock

CEO and co-host · the week before

Done when: one full run at 45 minutes, producer included

4 Follow up in order of intent

CEO and marketing owner · within 24 hours

Done when: recording sent; poll 2 answers worked first, by hand

SVV | THE PIPELINE PLAYBOOK | AN SVV VELOCITY RESOURCE

17 / 54

Publish the number nobody else has. **Cut it six ways.**

Opinion is everywhere; original data from your beachhead is not. Buyers, journalists and partners will all use a number they cannot get anywhere else, and every use carries your name.

1

Week 1 · the question
One question your buyers argue about and nobody can answer: “How long does a tender return take to assess?”

2

Week 2 · the survey
Ten questions, five minutes, multiple choice; two open questions at the end. Or anonymised totals from your own product.

3

Weeks 2–5 · the field
50 to 100 buyers in the beachhead, through your list, a co-hosting association and your partners. The incentive: they see the results first.

4

Week 5 · the number
One headline number a journalist can quote, three supporting findings, and the method on one page.

5

Week 6 · publish
A short summary ungated; the full report behind four fields. A named author and a date on the cover.

CUT IT SIX WAYS
1 · A launch webinar with a co-host
2 · A trade-press story built on the headline number
3 · Three LinkedIn posts, one finding each
4 · Step three of every outbound sequence
5 · An email your partners send to their clients
6 · A one-page handout for every event

79%

of B2B decision-makers are more likely to champion a vendor in an RFP if it consistently publishes quality thought leadership (Edelman–LinkedIn 2025, n≈2,000).

DO THIS NOW

1

Choose the one question
CEO · this month

Done when: one question your beachhead cannot answer today

2

Field the survey
Marketing owner · weeks 2–5

Done when: 50+ beachhead responses, or anonymised product totals

3

Write the report and the summary
Marketing owner, CEO to review · week 5–6

Done when: headline number, three findings, method page, named author

4

Publish and cut it six ways
Marketing owner · launch week

Done when: all six uses scheduled; downloads validated weekly

A tool the buyer will use. The answers qualify them.

A tool does work the buyer would otherwise do by hand. Gate the result, not the tool, and every answer they give becomes a field in your CRM.

TOOL	WHAT THE BUYER GETS	WHAT YOU LEARN	QUOINSTONE'S VERSION
ROI calculator	A number for the board: their inputs, your model, the assumptions shown	Volume, current cost, the budget holder	Tender packs a month × hours per pack × day rate = the annual cost of doing it by hand
Self-assessment	A score and a comparison with peers, in ten questions	Maturity, the trigger, timing	"Tender-return readiness": ten questions on volume, process, audit history
Template	The spreadsheet they build today, done properly	The workflow and who uses it	A subcontractor tender-scoring template, with the weights filled in
Benchmark tool	How they compare on one measure that matters	Where it hurts most	"Hours per tender pack" against contractors their size, from the research

BUILD RULES

Gate the result
Anyone can use the tool; the result, the PDF or the benchmark comes by email

Show the assumptions
A buyer who can see your maths will take it to the board

Answers become fields
Every answer writes to the CRM record; no spreadsheet of downloads

A person follows up
High scores and big numbers get a call within one working day

Build it plainly
A form and a spreadsheet is enough; launch in weeks, not months

DO THIS NOW

1

Pick the tool your buyer needs most
CEO · this month

Done when: one tool chosen from the four, with its inputs written down

2

Build it in a form and a spreadsheet
Marketing owner with whoever is technical · weeks 2–5

Done when: live on the site; results gated; answers into the CRM

3

Put it in sequences and events
Marketing owner · at launch

Done when: in sequence step three and on every event handout

4

Call every high result
CEO or the first seller · within one working day

Done when: each high result called; meetings logged

Be the answer when your buyer looks. In search and in AI.

Enterprise buyers do most of their research before they speak to anyone, and more of it now happens in an AI assistant. Judge this source by demo requests from your ICP, never by traffic.

Pages that capture intent

The problem page

The buyer's search, answered properly: "how to assess subcontractor tender returns"

Comparison pages

You against the spreadsheet, the in-house checklist and each named alternative. Fair, specific, dated

Pricing page

The model and a starting price. Buyers who cannot find it go elsewhere

Proof pages

Case studies in numbers; the trust pack: security, data residency, the DPA

Search

One page per problem

Each written for the question a buyer types, in the words they use

Answer first

The answer in the first paragraph; the detail and the method below it

Keep it current

A date on every page; updated when the numbers change

Measure the right thing

Demo requests from the ICP by page, from the CRM, not visits

AI answers

Why it matters

Nearly two-thirds of B2B buyers use generative AI at least as much as search to research vendors (Responsive, 10/2025, n=350)

Write to be quoted

Plain, factual pages: what you do, for whom, what it costs, how it integrates

Say it the same everywhere

Website, LinkedIn, review sites and directories describe you in the same words

Check it monthly

Ask three assistants the buyer's question; log whether you are named

DO THIS
NOW

1 Write the problem page and three comparison pages

Marketing owner · this month

Done when: four pages live, each with a demo request that writes to the CRM

2 Publish a starting price

CEO · this month

Done when: the model and a "from" price on the pricing page

3 Make every description match

Marketing owner · week 3

Done when: website, LinkedIn and directory listings say the same thing

4 Run the AI-answer check

Marketing owner · monthly

Done when: three assistants, the buyer's question, the result logged

Buyers follow people. **Post, comment, then talk.**

The founder’s own profile is the channel. A fixed weekly rhythm turns posts into conversations; anything automated breaches LinkedIn’s terms and costs the account.

THE WEEK · ABOUT THREE HOURS

Monday

Post: one number from your data or research, and what it means

Tuesday

Ten comments on posts by people in your target accounts

Wednesday

Post: one lesson from a deal or a pilot, without the client’s name

Thursday

Message by hand every buyer who engaged twice this week

Friday

Post: credit a customer or partner, with their permission

THE POST, IN FOUR LINES

The hook	A number or a claim in the first line: “14 hours. That is how long one tender pack takes to assess.”
The problem	In the buyer’s words, not yours
What you saw	The evidence: your data, a pilot, a conversation
One question	Invite the buyer’s view; no link, no pitch, no hashtag wall

THE RULES

The founder writes; marketing edits

Ghost-written posts read as ghost-written

Engagement becomes a conversation

A buyer who engages twice gets a personal message, never a sequence

Nothing automated

No auto-connect, auto-message or engagement pods: they breach LinkedIn’s terms

Into the CRM

Every conversation that starts here is logged with LinkedIn as its source

DO THIS NOW

1 Block the three hours

CEO · this week

Done when: recurring diary slots for Monday to Friday

2 Write the first three posts

CEO, marketing to edit · this week

Done when: one number, one lesson, one credit, ready to go

3 List 50 buyers to follow and comment on

Marketing owner · week 1

Done when: 50 named people in target accounts, followed

4 Message engaged buyers every Thursday

CEO · every week

Done when: messages sent by hand; conversations logged in the CRM

Your customers know your next customers. **Ask them.**

A referred buyer arrives already trusting you. Most companies never ask, or ask once and vaguely. Build the ask into the customer plan, make it specific, and do the work for the customer.

1

First value delivered
The week the customer sees the result. “You cut review time to three hours. Who else on your framework has the same volume?”

2

The first quarterly review
With the numbers in front of them. Ask for two names, and whether they would take a call from one.

3

Renewal
The customer has just chosen you again. Ask for an introduction and a reference for the case study.

WRITE THE INTRODUCTION FOR THEM
“Anna, I mentioned Quoinstone at the framework meeting. We use it to assess tender returns; it took our review time from 14 hours to 3 per pack. Their CEO, Sam, would like 20 minutes with you. I have copied him in.”

Three lines they can forward as they stand. The customer adds a name and presses send.

THANK THEM PROPERLY, AND MEASURE IT

Thank them	Early access to new features, a reference credit, a seat at the next dinner
Never cash	Cash rewards to enterprise buyers break most procurement and anti-bribery rules
Close the loop	Tell the referrer what happened, win or lose, within a week
Measure	Names given and meetings booked per live customer per year

DO THIS NOW

1 **Put the three asks in the customer plan**
CEO · this week

Done when: each live customer has the three moments dated

2 **Ask every live customer for two names**
CEO · this month

Done when: names received, with a forwardable introduction sent

3 **Write the thank-you rules**
CEO · this month

Done when: what you offer, written down; no cash

4 **Report referrals on the scoreboard**
Marketing owner · every Friday

Done when: referral leads on their own line, by customer

Someone else's client trust, on loan. **Part 4 covers it in full.**

An introducer who already advises your buyer gets you into the room on their word. It is the slowest source to set up and often the fastest to close. This is the one-page version.

THE ONE-PAGE VERSION

- 1

Find them through your customers
Ask each customer who they call before they buy; the same three or four firms come back

slide 48 →
- 2

Test the fit
Same buyer, complementary not competing, trusted now, a motive, a named person

slide 48 →
- 3

Start as an introducer
10% of first-year value for a warm introduction, 20% for a qualified opportunity; paid after the customer pays

slide 49 →
- 4

Equip them on day one
The agreement, the value story, the ICP card, a forwardable email, a case study, the trust pack

slide 51 →
- 5

Protect their trust above any deal
The CEO on every first deal; bad news to the partner within one working day

slide 52 →
- 6

Reward the ones who deliver
Three tiers on collected revenue, reviewed every quarter

slide 53 →

Quoinstone's introducers

Two consultancies that already advise the same commercial directors (workbook B1). Each makes two introductions a quarter; both are on the introducer terms until they have delivered two customers.

How it counts

An introduction is validated on arrival like any other lead and counted on its own line of the Friday scoreboard. Fees go in the budget and in CAC, so the partner's cost per customer sits beside every other source's.

DO THIS NOW

- 1

Ask five customers who they trust
CEO · this month

Done when: a list of named firms
- 2

Pick two that pass the fit test
CEO · week 2

Done when: two firms, a named person at each
- 3

Send the one-page agreement
CEO · week 5

Done when: both signed on introducer terms
- 4

Register every introduction
Marketing owner · from the first one

Done when: partner source and registration date on every deal

Join the room your buyer trusts. Give before you sell.

Your buyer belongs to an association and asks questions in a handful of practitioner groups. Standing there is earned by being useful in public, month after month.

The buyer's association

Join the right one

The body your buyer pays to belong to, not the AI one

Turn up, then speak

Attend two regional meetings; offer a talk on the research by the third

Join a working group

Guidance notes, standards and consultation responses put your name on the industry's documents

Sponsor with a purpose

Only a session or a report with your buyer in the room

Practitioner communities

Find where users ask

Forums, LinkedIn groups and messaging groups your users already use

Answer as yourself

Named, helpful, specific; no pitching and no links unless asked

Share the tools

Templates and the research summary, free, with no gate

Host one

A small group for your beachhead's practitioners, once you have twenty customers' users to start it

Make it count

One owner

The marketing owner, two hours a week, in the diary

A lead hypothesis

Which accounts each community should move

Source on every record

"Community: name" on the CRM record of anyone who comes from it

Review each quarter

Introductions and meetings per community; drop the ones that produce nothing

DO THIS
NOW

1 Name the buyer's association and join

Marketing owner · this month

Done when: membership confirmed; the next two meetings in the diary

2 List the five communities your users ask in

Marketing owner · week 2

Done when: five named groups, each with a member of your team in it

3 Offer a talk or a working-group seat

CEO · this quarter

Done when: one slot confirmed

4 Review the quarter's results

Marketing owner · each quarter

Done when: meetings by community; keep, change or drop each one

Earn coverage with data. Aim it at named accounts.

Press, awards and stages are means, not outcomes. Each one earns its place with a lead hypothesis written before it starts and a count of meetings after it ends.

Trade press	Lead with data Trade titles run original numbers; they rarely run funding news about a start-up they have not heard of	The titles your buyer reads Three trade publications and two newsletters, not the national tech press	The pitch The headline number, one customer quote, the method, 150 words; one title gets it first	A spokesperson The founder, briefed on three messages, available within hours
Awards	Your buyer's awards The industry's own awards, judged by buyers, not start-up awards	Enter with a customer A joint entry with the outcome in the customer's numbers	The shortlist is the asset A reason to call every target account the week it is announced	Use it everywhere In sequences, on the site, on the stand
Speaking and podcasts	Apply early Calls for speakers close months before the event; keep a list with the dates	Speak with a customer A joint talk on an outcome beats any solo product talk	Small and specific The podcasts and panels your buyer follows, however small the audience	Cut it down Record it; three clips for LinkedIn; the transcript becomes a page
DO THIS NOW	1 Write the lead hypothesis for each piece CEO · before each one Done when: target accounts named on the brief	2 Pitch the research to three trade titles Marketing owner · at launch Done when: one title first; coverage logged against target accounts	3 Enter one buyer-judged award with a customer Marketing owner · this year Done when: a joint entry submitted	4 List the calls for speakers for 2027 Marketing owner · this month Done when: dates and deadlines in the diary; two applications sent

PART 2 · SEVEN THINGS TO BUILD, IN ORDER

The engine.

Seven things to build, in this order, each with a done-when test. None of them needs a budget to start; all of them need a name and a date. Most companies have the first three done in a fortnight.

27 Pick the beachhead 28 Write the ICP 29 Set the floor 30 Build the list 31 Set up the CRM and the stages 32 Set the quota 33 Pay for the number
34 Pick two channels and test them 35 The rules by market

Pick one market you can win repeatedly. One sentence.

One beachhead means one message that sharpens every week, references that transfer, and a list small enough to know by name. Two markets at seed means two half-engines.

THE SENTENCE

**vertical × size ×
geography × trigger**

If it needs an "and" or an "or", it is two beachheads.

SCORE EACH CANDIDATE 1-5 ON EIGHT THINGS

Pain and trigger	20%	Budget and buyer	15%
Access	15%	Account count	10%
Cycle and procurement	10%	Alternatives	10%
ACV v floor	10%	References	10%

The sheet is in the templates pack. Highest total wins unless the evidence says otherwise. Ratings shown are illustrative.

EXAMPLE · FICTIONAL COMPANY

Quoinstone · AI agent that reads subcontractor tender returns for UK main contractors · £180k ARR · Series A opens 02/2028

A4.1

UK main contractors, £50m–£500m, England

Existing customers; 420 accounts; a framework award or a failed supply-chain audit is a public trigger.

B3.5

Irish main contractors

Same buyer, same workflow, EU residency already supported; a small market, starting cold. Niche one when the gate is met.

C3.2

M&E specialist contractors

Same tender returns, a different buyer; needs new references. Niche two.

QUOINSTONE'S SENTENCE (WORKBOOK A2.2)

We win mid-tier main contractors of £50m to £500m turnover in England when they win a new framework or fail a supply-chain audit.

DO THIS NOW

1Write the sentence for your top three candidate markets

CEO · this week

Done when: three sentences on one page, each with its evidence

2Score them on the eight criteria

CEO and whoever owns marketing · next week

Done when: a total for each; the winner named

3Check the evidence before you lock it

CEO · before week 3

Done when: fifteen written-up interviews, one matching customer or design partner, an account count from a named source

4Put the beachhead sentence on page one of the lead contract

Lead contract owner · week 2

Done when: signed

Fill in the ICP table. Then write who you will not sell to.

A table, not a paragraph. Every row is a test a lead must pass. “Any company that...” is no ICP: a list nobody can finish, messaging nobody recognises, references nobody can use.

ROW	WRITE	QUOINSTONE (FICTIONAL, FROM THE WORKBOOK)
Segment	the vertical, in the buyer’s words	Main contractors running subcontract supply chains of 200+ firms
Size	turnover and headcount bands, with the source	£50m–£500m turnover (Companies House)
Geography	where first, and why	England and Scotland; England first
Buyer	the role that signs, and its budget line	Commercial director or head of procurement
User and champion	who uses it weekly; who carries it	Pre-construction and commercial managers
Triggers	dated, detectable events	New framework award; failed supply-chain audit; subcontractor insolvency
Pain	the cost of the problem in their numbers	Tender returns assessed in spreadsheets and email: 14 hours a pack
Alternative	including doing nothing and building it	An in-house checklist and a shared drive
Procurement	what stands between a yes and a signature	Security questionnaire; DPA; standard terms
ACV	at list price, annual contracted basis	£35k–£60k; list £45k; floor £25k

The “we do not sell to” list.

A list, given to everyone who touches a lead. A disqualified account never enters a sequence, never gets a demo, and is flagged in the CRM so nobody re-adds it.

QUOINSTONE’S LIST (WORKBOOK A2.3)

- Housebuilders with no subcontract tendering
- Contractors below £20m turnover (below the floor)
- Public-sector clients directly (procurement longer than runway)
- Any buyer who wants an unpaid pilot

DO THIS NOW

1

Fill the rows from your last six deals, won and lost
Whoever owns marketing · week 1

Done when: every row has an entry and a source

2

Write four to six disqualifiers
CEO · week 1

Done when: each one would have saved you a wasted demo this year

3

Test the table on your three best customers
Both owners · week 2

Done when: all three pass every row; if not, the row changes, not the customer

4

Put both on page one of the lead contract
Lead contract owner · week 2

Done when: signed by the CEO

Set the floor with two sums. **Take the higher.**

The smallest annual contract a lead can carry and still be worth a demo, a proposal, a security review, a pilot and an onboarding. Leads below it are rejected before anyone spends an hour.

SUM 1 · CAPACITY

New ARR needed ÷ the deals a founder-led team can run in a year

Ten to fifteen deals a year is realistic with pilots. Use twelve until you have your own number.

Quoinstone: £771k new-logo ARR ÷ 18 deals the plan can run = £42.8k; list £45k, so the capacity sum is met at list

SUM 2 · PAYBACK

Cost to acquire a customer ÷ (gross margin × 1.5 years)

Investors read payback under 12 months as strong and 12–18 as acceptable; 18 months is the outer limit.

Quoinstone: CAC £10.1k ÷ (0.60 × 1.5) ≈ £11k. **The workbook sets the floor at £25k: the price below which it would rather lose the deal.**

Annual contracted basis

Whatever the pricing model, the floor is tested against the annual minimum the customer commits to. Design pricing so there is one.

Pilot and set-up fees are not ACV

Track them separately. A cash-flow bonus, not the number the next investor prices.

Set it on the committed part

Pricing is moving from seats to work done; hybrid models rose from 27% to 41% of companies in a year. The floor sits on the platform fee, not the usage forecast.

It applies from now

Existing customers below the floor are kept and grown. The floor governs every new lead, and sits in the disqualification list.

DO THIS
NOW

1 Run sum 1 from your next-round target (workbook A4)

CEO · today

Done when: a number, written down, labelled provisional

2 Run sum 2 from last year's spend and deals

CEO with whoever does the numbers · week 1

Done when: a second number; the floor is the higher, or the price below which you would rather lose the deal

3 Check your list price clears it

CEO · week 1

Done when: a typical deal at list is above the floor; if not, pricing changes before the list is built

4 Write the floor into the lead contract and the disqualifiers (A2.3)

Lead contract owner · week 2

Done when: signed; every lead is validated against it

Build a list of 200 to 500 accounts, from sources you can name.

The most valuable asset marketing makes at seed, and the one most often outsourced badly. A year of engine, small enough to know every name.

THE FIVE STEPS, IN ORDER

- 1

Pull the raw list

Companies House by SIC code and filed turnover (free API); the CRO for Ireland. Add the industry body's membership list and the trade league table.
- 2

Cut it with the ICP and the disqualifiers

Size band, geography, segment. Remove the five disqualifier types. Expect to lose half.
- 3

Tier it

Tier 1: twenty to fifty accounts the founders work by hand, buying group named. Tier 2: the rest, through sequences.
- 4

Attach a trigger to each account

The award notice, the hire, the news item, with its date. No trigger, no sequence: the account waits until one appears.
- 5

Enrich and validate

Named buyer and user with current titles; a working business email; ACV estimate from the size band. Validated only when all six parts pass (slide 31).

WHERE THE TRIGGERS COME FROM · UK AND IRELAND

Public contract notices	Find a Tender, Contracts Finder, eTenders: a dated award with the buyer named
Companies House filings	new directors, charges, accounts: a change of control or a growth spurt
Job boards	hiring for the user role means the workload the product addresses
Trade press	wins, hires and disputes, with a date
LinkedIn Sales Navigator	job changes for the buyer role; by hand, never through automation
Your own CRM	closed-lost on timing, lapsed pilots, customer referrals: the cheapest validated leads you will ever get

Every record carries: account · tier · size evidence · roles · trigger and date · ACV estimate · disqualifier check · source · lawful-basis note · owner · date added · status

DO THIS NOW

- 1

Pull the first 100 accounts from one named source

Whoever owns marketing · this week

Done when: 100 rows, source recorded on each (Quoinstone's 420 came from Companies House, award feeds and job postings)
- 2

Cut to the ICP and tier them

Marketing owner, CEO checks Tier 1 · week 2

Done when: Tier 1 named; Tier 2 sized
- 3

Attach a dated trigger to every Tier 1 account

Marketing owner · week 3

Done when: no Tier 1 account without a trigger
- 4

Validate and refresh monthly

Marketing owner · from week 4, first Monday of each month

Done when: the validated count on the scoreboard

Nine stages and one flag. **Configure them first.**

An Attio- or Pipedrive-class CRM you can run in a week, not a suite you configure for a year. The workbook’s stages are the standard; map yours onto them.



MARKETING DELIVERS HERE

SALES OWNS FROM THE QUALIFICATION CALL ONWARDS

THE VALIDATED FLAG · SIX PARTS, EACH PASSED OR NOT

✓ Matches the ICP, with evidence on the record

✓ Dated trigger inside the window

✓ No disqualifier; not on the suppression list

✓ Named buyer and user, current titles

✓ ACV estimate at or above the floor

✓ One source recorded; founder-network flagged

FIELDS TO ADD THIS WEEK

On the account:

tier · source · trigger and date · ACV estimate · validated (yes/no) · lawful basis · disqualified (yes/no).

On the deal:

stage 0–8 · accepted/rejected and reason · the six qualification fields, required before stage 2 · lost reason.

Automations:

rejection reason required on reject; a stale-deal flag at 14 days; the end-of-day pipeline snapshot to Slack or email at 17:30 (workbook C3.1).

DO THIS NOW

1

Choose the CRM: Attio by default; Pipedrive, folk or Close if one fits better

CEO · this week

Done when: account created; the team invited; live by 31/01/2027 at the latest

2

Configure the nine stages and the validated flag

Marketing owner · week 1

Done when: stages named exactly as here; the flag is a required field

3

Add the account and deal fields and the three automations

Marketing owner, with whoever is technical · week 2

Done when: a test account moves 0 → 2 with every field filled

4

Load Tier 1 and start the daily snapshot

Marketing owner · week 2

Done when: the 17:30 snapshot arrives every working day

Work backwards from the next round. It sets the quota.

Round → ARR needed → deals → proposals → demos → qualified meetings → replies → validated leads in sequences → the weekly quota. The chain and the rates are the workbook’s planning model (A4); replace the rates with your own cohorts after the first quarter.

STEP	RATE	QUOINSTONE (FICTIONAL, WORKBOOK A4)	PUBLISHED RANGE AND NOTE
ARR when the round opens		£1.0m, Series A, 02/2028	about £1m is the entry ticket; around £2m the median (Carta/SVB, 2025–26)
New-logo ARR needed		£771k	after 90% GRR, 105% NRR and £40k contracted
Deals at the target ACV	£45k	18	list price, above the £25k floor
Proposals → won	27% blended	67 proposals	80% go through a paid pilot converting at 55%; the rest direct at 25%
Demos → proposals	40%	167 demos	demo answers usage, value and integration
Qualified meetings → demos	70%	239 meetings	six fields recorded; ACV at or above the floor
Replies → qualified meetings	40%	596 replies	1–5% reply rates typical; 10%+ top decile (Instantly, Belkins, Smartlead)
Validated leads in sequences → replies	3%	19,842 a year	c. 1,650 a month; quota 100 validated leads a week from week 3

WHAT IT MEANS

1,650 validated leads a month produce 20 qualified meetings, 14 demos, 5.6 proposals and 1.5 deals. One lead in a thousand becomes a customer: validation, not volume, is the job.

Coverage to plan on: 3.7× on proposal-stage pipeline. Three times is the floor, not the plan.

CAPACITY CHECK

The workbook’s Capacity tab prices the plan at 200–310 hours a month against 104 founder hours (two founders at twelve hours a week). The gap is the hiring plan: the first SDR trigger fires in January. If the hours do not exist, the target is not a plan.

DO THIS NOW

1 Fill the model’s Inputs and Next round tabs

CEO · this week

Done when: the Reverse funnel and Monthly plan tabs transcribed into workbook A4

2 Set the weekly validated-lead quota from the model

Both owners · week 2

Done when: in the lead contract, signed (the workbook offers 50, 100 or 150 a week)

3 Run the capacity check and name who covers the gap

CEO · week 2

Done when: hours needed, founder hours available, the gap covered by hire, tooling or a smaller plan

4 Replace every rate with your own cohort data

Marketing owner · week 13

Done when: the model rerun; the quota reset

Pay each role for its number. Pay it from cash received.

Three plans, each tied to one number the person can move. Every commission and bonus is costed into the quota and the revenue target before the year starts.

SALES LEADERSHIP

The team's number, not their own.
A bonus when the whole sales team meets company quota.

No personal deal credit and no override on each sale: the leader wins only when the team does.

SALES

Two rates and a company bonus.
One % commission up to personal quota, a higher % above it, and a fixed bonus when the company hits annual quota.

Commission on first-year billed ARR. Pilot fees, set-up fees and one-off charges earn nothing.

MARKETING

Ten months out of twelve.
An annual bonus for meeting the lead quota in 10 of the 12 months.

Counted leads as the lead contract defines them; the month-by-month count is on the Friday scoreboard.

WORKED EXAMPLE · ILLUSTRATIVE RATES

Company new-logo quota £800k; two account executives at £400k each

Account executives × 2	10% to quota, 15% above it, £5,000 each at company quota	£90,000
Sales leader	£20,000 when the team reaches £800k	£20,000
Marketing owner	£8,000 for the lead quota in 10 of 12 months	£8,000
Variable pay at 100%	14.8% of new ARR · each £100k above quota adds £15,000	£118,000

Built into the target

Variable pay at 100% and at the upside case is a budget line before the year, and counts in CAC. Set the revenue target so it pays for the plan.

Paid on cash

Earned when the deal signs; paid only once the customer's payment has cleared. No cash, no commission or bonus.

DO THIS NOW

1 Write a one-page plan for each role
CEO · before the next offer letter
Done when: rates, quota, measure and payment timing, signed by both

2 Cost the plans at 100% and 120% of quota
CEO with whoever does the numbers · week 2
Done when: both lines in the budget; CAC rerun with them in

3 Put the cash rule in every plan
CEO · before anyone signs
Done when: "paid in the payroll after the customer's payment clears"

4 Track attainment on the scoreboard
Marketing owner · every Friday
Done when: company quota, each rep's quota, and the months-at-lead-quota count

Run two six-week tests. Kill, fix or scale at week six.

Never more than three channels at once. Fixed budget, one owner, one sheet. Success is cost per counted lead and the engaged and qualified rates of that cohort, nothing else.

Trigger-based outbound		THE BACKBONE AT SEED		
Email, LinkedIn by hand and the telephone, to a validated list, on the trigger. Three to five email steps over two weeks with LinkedIn and a call layered in (workbook B2).				
First lead 2–3 weeks	Published yield Replies 1–5% typical, 10%+ top decile; 0.3–1% of contacts book a meeting, 1–2.5% for a tight ICP with a trigger			
Partners and introducers		SECOND TEST FOR MOST		
Consultancies, systems integrators and complementary vendors who already sell to the buyer. A referral agreement and a monthly call.				
First lead 4–8 weeks	Published yield Referral leads win at 30–50% against 8–15% for cold outbound			
Customer referrals		FREE, AND USUALLY FORGOTTEN		
Asked at onboarding and at every success milestone, as a step in the process, not a favour.				
First lead Immediate	Published yield Referrals cost c. \$25 a lead against \$225 for cold email (Sopro, 2025)			
Events		ONLY WITH MEETINGS BOOKED FIRST		
Four to six a year where the ICP is; ten meetings booked before the event; no stand without a meeting plan.				
First lead The event date	Published yield \$500–2,000 per lead; 80% of show leads are never followed up			
Founder content		ONE PIECE A WEEK, ON THE TRIGGER		
Written on the outcome in the customer’s numbers; measured by leads sourced to it and the lift in reply rates.				
First lead 3–6 months	Published yield SEO and thought leadership take 6–12 months to pay back			
Paid		NOT AT SEED		
Except retargeting the account list and LinkedIn to named accounts, under a hard cost-per-counted-lead cap.				
First lead 4 weeks	Published yield Paid LinkedIn c. \$400 a lead; PPC c. \$460 (Sopro, 2025)			
DO THIS NOW	1 Choose test 1: trigger-based outbound to Tier 1		2 Choose test 2: two partners or the customer-referral step	
	Marketing owner · week 3		CEO · week 3	
	Done when: the first 100 contacts sent from a persona sequence; the test sheet open		Done when: two introducer calls booked, or the referral ask written into onboarding	
	4 Kill, fix or scale each test		Both owners, at the Monday meeting · week 9	
Done when: a decision recorded for each; the next test chosen				

Outbound to businesses is legal in the UK and Ireland. **Set up four things first.**

General guidance, not legal advice; checked 23/10/2026, and they change. Take advice before each new market.

United Kingdom

Unsolicited marketing email to **corporate subscribers** (limited companies, LLPs, Scottish partnerships) is allowed without consent; **sole traders and ordinary partnerships are individuals** and need consent or a soft opt-in, whatever the address looks like. Every email identifies the sender and carries a working opt-out. Named contacts are personal data: rely on legitimate interests, record the assessment, honour objections absolutely. Phone: screen lists against TPS and CTPS. Since 05/02/2026 the maximum PECR penalty is £17.5m or 4% of worldwide turnover.

Ireland

Individuals: prior consent, and the burden of proof is on the sender. Business addresses: an opt-out regime; stop when told (S.I. 336/2011, reg. 13). Sender identity and a valid cease address in every email; each non-compliant email is a separate offence, with fines up to €250,000 on indictment, and the DPC prosecutes (2018, 2022, 2024, 2026). Phone: respect the NDD opt-out register; mobiles need consent.

Wider EU

The ePrivacy Directive requires consent for natural persons and lets each state set its own corporate-subscriber rule, so B2B email rules differ by country. Germany requires prior express consent with no B2B carve-out (§7 UWG); Austria and the Netherlands likewise. No email sequences into those markets: telephone, LinkedIn by hand, partners and events.

LinkedIn and mailbox providers

LinkedIn’s User Agreement (03/11/2025) bans bots, scraping and automated connecting or messaging; accounts are restricted for it. Manual, personalised, low volume. Google and Yahoo require SPF, DKIM and aligned DMARC for bulk senders, one-click unsubscribe and spam complaints under 0.3% (target 0.1%); Microsoft since 05/05/2025.

DO THIS NOW

1

Three domains, six mailboxes; SPF, DKIM, DMARC on each
Whoever is technical · week 1
Done when: all three pass; warm-up 5–10 a day for 4–6 weeks, then 30–50 a day per mailbox

2

Write the identification block and the opt-out line
Marketing owner · week 1
Done when: company, reply address, postal address and opt-out in every template

3

Record a legitimate interests assessment; check with your adviser
CEO · week 2
Done when: one page, dated, filed; the adviser’s note on file (workbook C2.2)

4

Create the suppression list across every tool
Marketing owner · week 2
Done when: an opt-out in one channel is an opt-out in all

PART 3 · THE OPERATING RHYTHM

Running it.

Four fixed events in the diary, a hand-off that leaves no room for argument, a rule for when it misses, and the resourcing decision answered by stage. None of it runs on anyone's willpower.

37 The hand-off 38 The Monday meeting 39 The Friday scoreboard 40 When it misses 41 Who does the work 42 The first hire 43 The stack
44 The first 90 days 45 Decide this week

Through the CRM, and nowhere else.

A lead that arrives in a message, a spreadsheet or a conversation does not exist for the purposes of the contract: it cannot be counted, dated or disputed. Six steps, two service levels, seven reasons.

STEP	WHO	BY WHEN	RECORDED IN THE CRM
Entered as validated	Marketing	as validated	validated flag, six parts, source, date
Accept or reject	Sales	2 working days	accepted, or rejected with one reason from the list
Sequenced or booked	Sales	5 working days	sequence and step, or the booked call
Engaged	Sales	30 days from first touch	stage 1, date
Qualified or disqualified	Sales	60 days from first touch	stage 2 with the six fields, or stage 8 with the reason
Dispute	The CEO	next Monday	a CRM note; five minutes, on the evidence

THE ONLY VALID REJECTION REASONS

NOT ICP

BELOW THE ACV FLOOR

NO TRIGGER EVIDENCE

WRONG ROLE

DUPLICATE

DISQUALIFIED

OTHER, WITH A NOTE

The first two count against marketing's acceptance rate. "Other" is reviewed on Monday.

Quota void if sales misses its service level.

Nobody can be judged on leads nobody worked. The scoreboard shows the miss; Monday decides what changes. Both service levels are in the contract, so nobody has to argue it on the day.

- DO THIS NOW

1

Make "reason" a required field on reject

Marketing owner · week 1

Done when: a lead cannot be rejected without one of the seven
- 2

Agree the two service levels in writing

Both owners, CEO signs · week 2

Done when: two and five working days in the lead contract
- 3

Add the 14-day stale flag and the 30/60-day timers

Whoever is technical · week 2

Done when: the flags fire on a test deal
- 4

Settle the first dispute on Monday, on the record

CEO · first Monday it arises

Done when: five minutes; the decision written on the CRM record

Thirty minutes, six items, same slot every Monday.

This is the workbook’s weekly pipeline review (C3.2) seen from the lead-generation side. The CRM is on the screen; nobody prepares slides; each item produces a decision, logged in the CRM.

5 MIN	Coverage against the quarter	Proposal-stage and weighted pipeline against the quarter’s new-logo target, and the lead supply behind it: validated leads against the weekly quota, by source; founder-network leads on their own line.	Build pipeline, or hold.
5 MIN	Ageing: every stale deal	Accepted leads not sequenced within five working days; deals with no activity for 14 days. Each gets a next action and an owner, by name.	Action or close each one.
5 MIN	Conversion by stage, trailing four weeks	Reply, meeting, demo and proposal rates against the model’s assumptions; acceptance and rejection reasons on last week’s leads. One cohort under is noise; two is a signal.	Change an assumption, or fix the stage.
5 MIN	Slipped and lost this week	Every slip and loss with its reason category; every rejection with its reason. “Not ICP” and “below floor” are marketing’s to fix this week.	A pattern to act on.
5 MIN	Activity against plan	Contacts sequenced, meetings and demos held against the model’s monthly plan; the two channel tests against their sheets.	Next week’s numbers.
5 MIN	Decisions, owners and dates	Which Tier 1 accounts the CEO works by hand; what the operator validates; disputes settled by the CEO in the time, on the evidence.	Logged in the CRM.

DO THIS NOW

1

Book the recurring slot: Monday 09:00 or 16:00

CEO · today

Done when: 30 minutes, every week, in every diary that matters

2

Put the six items in the invite

Marketing owner · today

Done when: the agenda is the invite; nothing else is prepared

3

Run the first one from the CRM, even if it is mostly zeros

CEO chairs · next Monday

Done when: six decisions logged in the CRM

4

Hold the time

CEO · every week

Done when: starts and ends on time; disputes capped at five minutes

Five lines, every Friday by 16:00, to the whole company.

A lead number only marketing can see is a lead number nobody will believe. The same five lines every week, to everyone. It sits alongside the workbook’s daily 17:30 snapshot and feeds the Monday review; it does not replace either.

1	Validated leads against quota	this week and month to date, by source; the trailing three months	EXAMPLE · FICTIONAL 100 a week quota · 92 this week · 3-month trend ↑
2	Acceptance rate	accepted ÷ delivered, with rejections by reason	EXAMPLE · FICTIONAL 94% · 6 rejected: 3 not ICP, 2 wrong role, 1 duplicate
3	Reply and qualified-meeting rates	by monthly cohort and by source, against the model's assumptions	EXAMPLE · FICTIONAL Sept cohort: 3.4% replied (plan 3%) · 38% of replies to a qualified meeting (plan 40%)
4	Cost per validated lead and per qualified meeting	by channel, against the cap	EXAMPLE · FICTIONAL outbound £9 a lead, £420 a meeting · introducers £180 a meeting
5	Founder-network leads	on their own line, never inside line 1	EXAMPLE · FICTIONAL 6 this month · 2 meetings · shown separately

DO THIS NOW	1 Build the five lines as a saved CRM report or one sheet Marketing owner · week 2 Done when: the five numbers come from the CRM, not from memory	2 Set the Friday 16:00 reminder and the channel it goes to Marketing owner · week 2 Done when: Slack channel or email list, the whole company on it	3 Publish the first one, zeros included Marketing owner · first Friday Done when: it went out on time; nobody asked for a different format	4 Read it, do not present it, on Monday CEO · every week Done when: items 1, 3 and 5 of the Monday review are answered from these lines
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Below 70% of quota two months running: **diagnose in this order.**

Written in advance so nobody has to be brave on the day. One variable at a time, four weeks between changes, and a hard stop at three months.

1

The list

Is it the ICP? Are there triggers?

Check: Pull 20 random validated leads. Count how many pass all six parts, and how many have a trigger under 90 days old. Under 16 of 20: the list is the problem.

Change: Rebuild Tier 1 from a named source; add triggers; re-validate.

2

The messaging

Trigger → problem → proof → ask?

Check: Read the last 30 first-touch messages. Does each name the trigger, the problem in the buyer's numbers, one proof, one ask? Reply rate by variant.

Change: Rewrite one variant; run it on 50 leads; compare at four weeks.

3

The channel

Is the test the wrong channel?

Check: Cost per counted lead and engaged rate of the cohort against the published ranges on slide 34.

Change: Kill one test; start the next on the list.

4

Capacity

Are the hours there?

Check: Hours actually spent against the 20–25 and 6–8 in the plan. Touches sent against the plan.

Change: Resource it (slide 41), or cut the quota to the hours you have.

DO THIS NOW

1

Write the 70% rule into the lead contract

CEO · week 2

Done when: in the contract, and in every marketing hire's and agency's terms

2

Run the four checks the first time the rule trips

Both owners · the Monday after month two

Done when: one variable changed; a four-week review date set

3

Hold the three-month stop

CEO · month three below 70%

Done when: the plan, the supplier or the person changes; recorded

4

Rerun the Lead maths on real cohorts

Marketing owner · at the quarterly reset

Done when: the quota reflects your own rates, not the illustrative ones

Resource it by stage. A decision, not a menu.

The answer to “what resources should we employ” depends on one thing: whether the supply of validated leads is the binding constraint on the founders’ time. Read your row; do what it says.

YOUR STAGE	WHO OWNS THE LEAD CONTRACT	WHO DOES THE LEAD WORK	WHO SELLS	WHAT IT COSTS A MONTH	MOVE TO THE NEXT ROW WHEN
ROW 1 Pre-seed, 0–2 customers	The CEO, 6–8 hours a week, fixed in the diary	The CEO; a freelancer for list building and enrichment (£25–40 an hour) if cash allows	The CEO or a co-founder	£200–600 a month on tools and data	Five or more deals through a written process, or the CEO's lead work passes 10 hours a week
ROW 2 Seed, 3–10 customers	A lead-generation operator (the first commercial hire) or a fractional head of growth two days a week	The operator: list, validation, messaging, proof assets, inbound; sequences too while volumes allow	The CEO; the operator books the calls	one salary (demand-gen £50–70k London, €55–65k Dublin, plus 15% NI / 11.4% PRSI) or a fractional £3–8k a month, plus £400–900 on the stack	Validated-lead supply is the binding constraint and the founders' outbound passes 10 hours a week
ROW 3 Seed, 10+ customers or quota above the founders' capacity	The operator, now owning sequences; agencies for list building and enrichment only	The operator plus an SDR, or a two-person lead team; the CEO keeps Tier 1	A first sales hire, once the written process has five deals through it; the CEO owns the contract between the two	two salaries, the stack, an events budget; an agency only for list building at £2–4k a month	A meaningful share of new ARR closed by non-founders by the time the Series A opens; the engine repeating in a second niche

DO THIS NOW	1 Find your row and write it on the lead contract CEO · this week Done when: the row number and the trigger for the next row, in the contract	2 Cost the row for the next two quarters CEO with whoever does the numbers · week 2 Done when: a line in the budget: people, stack, data, events	3 If you are in row 1, block the CEO's 6–8 hours CEO · today Done when: recurring diary blocks; the Monday meeting is one of them	4 If you are in row 2, open the hire or the fractional search CEO · week 2 Done when: the job description from slide 42 is out; three candidates by week 6
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Hire a lead-generation operator, not a brand marketer.

One person who owns the lead contract end to end: list, validation, messaging, proof assets, inbound and, while volumes allow, sequences.
Measured on counted leads a month, and nothing else.

THE JOB, IN ONE PARAGRAPH

You own the lead contract. You build and refresh the target account list from named sources, attach triggers, validate every lead, write the messaging, run the channel tests, build the proof assets, capture inbound, and publish the scoreboard every Friday by 16:00. You are measured on counted leads per month against the contract, and on their quality. Everything else is in service of that.

PROFILE THAT WORKS AT SEED

Two to five years in B2B demand generation, or an SDR who built their own lists; has run a CRM and a sequencer hands-on; can write; comfortable on the telephone; has worked in a company under 30 people. Not a brand or content marketer, not a “head of marketing” from a team of ten, not anyone whose portfolio is campaigns rather than numbers.

What to pay: SDR London base £27–38k (OTE £42–66k); Dublin €45–55k. Demand-gen marketer, 3–5 years: London £50–70k; Dublin €55–65k. Fractional head of growth £3–8k a month for 2–4 days a week. Add 15% employer NI (UK) or 11.4% PRSI (IE).
Or outsource the list only: UK outsourced SDR £2–4k a month freelance, £4–7k small agency; Sopro from c. £3k. Never without a lead number.

FIVE INTERVIEW QUESTIONS

1. Show me a list you built: where did each account come from? · 2. What was your counted-lead number last quarter, and how was it measured? · 3. Rewrite this first-touch email in five minutes. · 4. A lead sales rejected as “not ICP”: what do you do on Monday? · 5. Which of your campaigns would you kill today, and why?

FIVE SIGNS YOU ARE ABOUT TO HIRE THE WRONG PERSON

They talk about brand before leads · they have never built a list themselves · they want a budget before a number · their references describe campaigns, not pipeline · they are uncomfortable being measured monthly

DO THIS
NOW

- 1

Write the job from the paragraph above, with the counted-lead clause in the contract

CEO · week 2

Done when: a one-page job description; the scoreboard clause in the offer

- 2

Ask the five questions of every candidate

CEO · every interview

Done when: a built list, a number, a rewritten email in the room

- 3

Set the 90-day plan before day one

CEO and the hire · before start

Done when: the first-quarter quota, the two tests and the Friday scoreboard are theirs from week 1

- 4

Review at 90 days on the five lines

CEO · day 90

Done when: counted leads against quota; the 70% rule applies from month four

The lead-generation stack. All of it writes to the CRM.

The full nine-layer stack, with EU hosting and startup programmes, is workbook C2.1. These are the layers lead generation needs; list prices checked October 2026.

LAYER	TOOL	WHAT IT DOES FOR THE ENGINE	LIST PRICE, CHECKED 23/10/2026
System of record	Attio (default); Pipedrive, folk or Close	every account, contact, deal and activity; the nine stages; the daily snapshot	Attio Plus \$35, Pro \$79 a seat (annual); up to 80% off for startups. Pipedrive Growth \$39, Premium \$59
List and enrichment	Apollo or Clay; Kaspr or Cognism for UK/EU phone numbers	emails, titles, firmographics; trigger monitoring	Apollo Basic \$49, Pro \$79 a seat (annual). Clay from \$54 a month. Kaspr €45–79 a licence. Cognism quote-based
Sequencing	Instantly, Smartlead or lemlist	multi-step email with per-mailbox limits; writes replies to the CRM	Instantly Growth \$37.60 (annual) / \$47; Smartlead Base \$39; lemlist Email \$55 / \$69
Sending domains and warm-up	Three secondary domains, six mailboxes; warm-up in the sequencer	protects the primary domain; 5–10 a day ramped over 4–6 weeks; then 30–50 a day per mailbox	.co.uk £5–13 a year each; warm-up included, or MailReach from \$25 a mailbox
LinkedIn	Sales Navigator Core, one seat	job-change triggers and the buyer role; by hand	£94.99 a month or £959.88 a year (ex VAT)
Public data	Companies House API; CRO Open Services; Find a Tender; Contracts Finder; eTenders	the raw list and the dated triggers	Free (Companies House: 600 requests per five minutes)
Inbound and booking	Website form to the CRM; Calendly or Cal.com	every demo request validated on arrival; reply within one working hour	Calendly Standard \$10 a seat (annual); Cal.com free or Teams \$12
Scoreboard and snapshot	A saved CRM report; Slack or email at 17:30	the five lines on Friday; the pipeline every evening	Included in the CRM

Not yet.

A marketing-automation suite · an ABM platform · an “AI SDR” that sends at volume (77% of users cannot confirm it paid back) · a second CRM for marketing · an agency retainer without a lead number · a website rebuild before the value story exists.

Where AI earns its place.

Trigger monitoring, enrichment, ICP scoring and first-draft personalisation. A human validates every lead and writes the ask: human-written LinkedIn messages get c. 12% more acceptances; manual email replies at twice the rate of automated.

DO THIS NOW

1 Open the CRM and the sequencing tool; connect them

Whoever is technical · week 1

Done when: a reply in the sequencer appears on the CRM record

2 Set up three secondary domains and six mailboxes; start warm-up

Whoever is technical · week 1

Done when: SPF, DKIM, DMARC pass; 5–10 a day for four to six weeks

3 Route the website form into the CRM with the validated flag

Whoever is technical · week 2

Done when: a test submission lands at stage 0 with the six fields

4 Transcribe the tools into workbook D2.3 and cap the monthly cost

CEO · week 2

Done when: £400–900 a month before people; the review on the quarterly reset

Ninety days, four blocks, one owner per line.

The same Q1 as the workbook’s D3.2, seen from the lead-generation side. The engine produces its first leads at quota in weeks four to nine, not week one. Owners below are the defaults.

WEEKS 1-2

Set up

☐ Lead contract signed

CEO

☐ ICP, disqualifiers, beachhead written

CEO

☐ Floor set from the model

CEO

☐ CRM live: stages, required fields

Mktg

☐ Three domains, six mailboxes warming

Tech

WEEKS 2-4

Build

☐ 200-500 accounts, tiered, Tier 1 validated

Mktg

☐ Persona sequences and the qualification script

Both

☐ One-page value story v1

Mktg

☐ Two tests chosen, budgeted, owned

Both

☐ First Friday scoreboard published

Mktg

WEEKS 4-9

Run

☐ Sequences live; Monday review weekly

Both

☐ First validated leads at quota; first rejections

Both

☐ First proof asset used in a live call

Mktg

☐ Cohort data: replies, meetings, acceptance

Mktg

☐ Capacity check against real hours

CEO

WEEKS 10-13

Decide

☐ Kill, fix or scale each test

Both

☐ Model rerun on the first cohorts; quota reset

Mktg

☐ Resourcing row confirmed or moved

CEO

☐ Quarterly review (workbook C3.4)

CEO

☐ The next two tests chosen

Both

DO THIS NOW

1

Copy the twenty lines into the workbook’s register (Appendix 4)

CEO · today

Done when: every line has a person and a date

2

Put weeks 1-2 in this week’s diary

CEO · today

Done when: five diary blocks exist

3

Report against the plan on Monday

Marketing owner · every Monday

Done when: the block’s lines ticked or dated

4

If you do nothing else this month

CEO · this month

Done when: the two owners named; Monday meeting booked; beachhead and disqualifiers on one page; nine stages configured; one scoreboard published

Four decisions, one owner each.

Everything else in the playbook follows from these. None of them needs a budget; all of them need a name and a date. Make them before Friday and the ninety days start on Monday.

01

Who owns which number

The lead contract owner and the sales owner, by name, from this week. In a four-person company the CEO holds both and still publishes two numbers.

CEO · TODAY

02

The beachhead and the floor

The one-sentence beachhead, the “we do not sell to” list, and a provisional ACV floor from the capacity sum: new ARR needed ÷ 12. Label it provisional.

CEO AND THE LEAD OWNER · TWO WEEKS

03

The definitions and the rhythm

Adopt the nine stages and the validated-lead definition as written; fix the Monday slot and the Friday 16:00 publication; confirm the two service levels.

BOTH OWNERS, ARBITRATED BY THE CEO · TWO WEEKS

04

Your resourcing row

Read slide 41. Row 1: block the CEO’s hours. Row 2: open the operator or contractor search this week. Row 3: the SDR when meetings are the constraint; the account executive once five deals are through the process.

CEO · THIS WEEK

THE COMPANION

The Word playbook and its templates pack carry every sheet named in this deck: the lead contract, the ICP table, the beachhead matrix, the Lead maths, the target account list, the channel test sheet, the weekly scoreboard, the Monday agenda. The 2027 Commercial Strategy Workbook is where you write the plan itself; the stage names and definitions are the same in both.

PART 4 · CHANNEL PARTNERS

Getting others to sell.

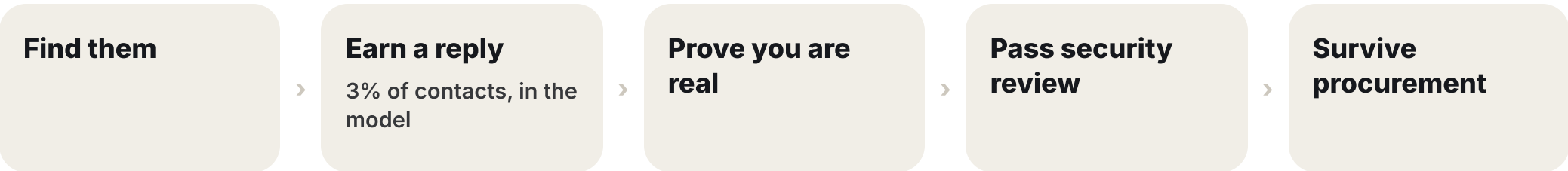
A partner who already serves your buyer brings what outbound cannot buy: trust. Trust shortens the deal. It also belongs to the partner, and keeping it intact is the whole job.

47 The partner's trust is the asset 48 Find the right partners 49 Structure the deal 50 Resource and run them 51 What a partner will expect
52 Protect the partner's trust 53 Partner tiers

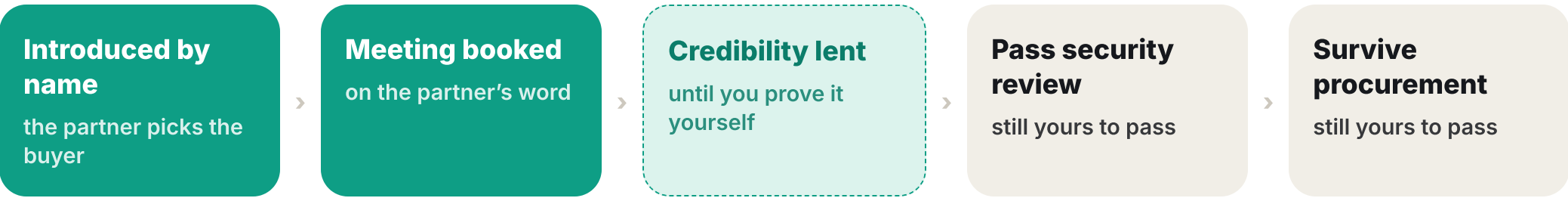
Partners lend you their clients' trust. **It stays theirs.**

A cold buyer starts at zero and makes you earn every step. A buyer introduced by an adviser they already trust starts most of the way there. That is the only reason to have partners, and the reason to be careful with them.

Cold you and a stranger



Through a partner you, introduced by an adviser the buyer already trusts



Trust shortens the front of the deal, not the back. The partner gets you into the room and lends you credibility; the security review, the procurement file and the pilot are still yours to win.

What the partner lends you

Years of delivery with that client, access to the buyer, and their name on your first meeting.

What they risk if you fail

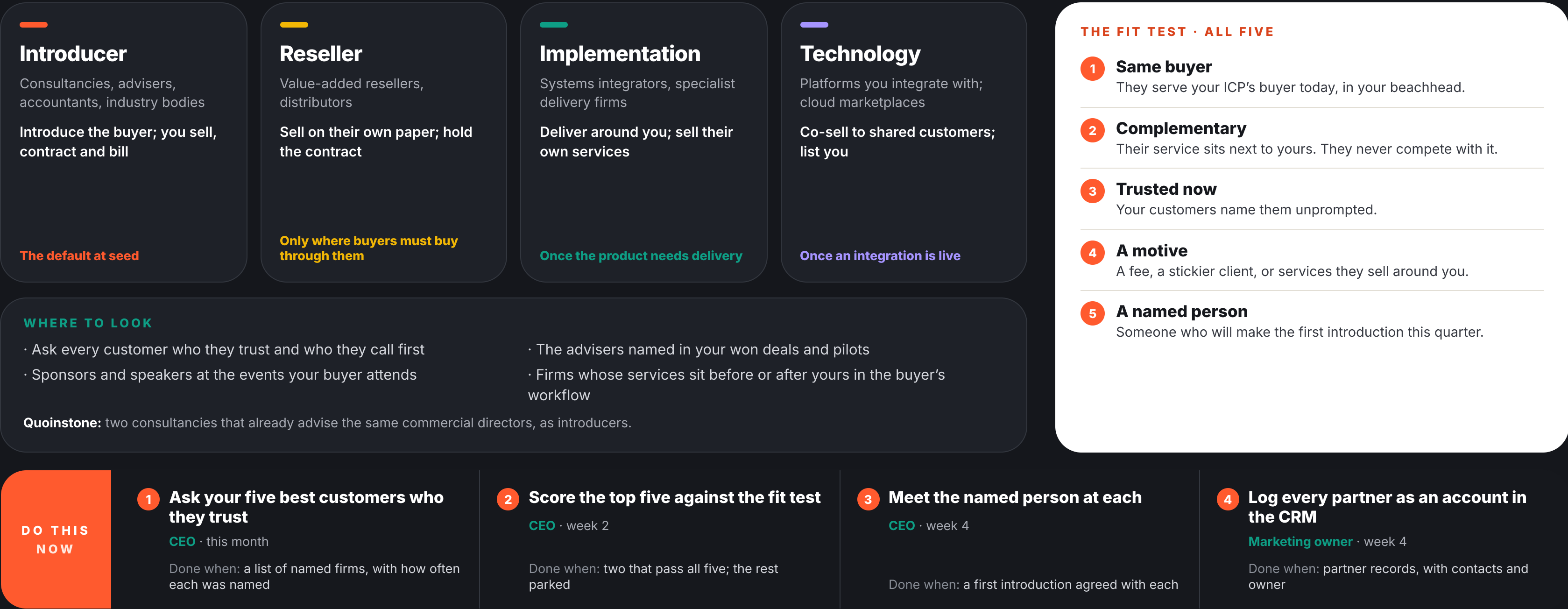
Their standing with a client they will still be serving long after your pilot ends. You can lose a deal; they can lose the client.

11.7% average win-rate lift on deals with a partner involved (Crossbeam network data, 28/10/2024; vendor-reported).

The rule for this part: you are borrowing trust. Pay it back with outcomes, or do not borrow it.

Find who your buyer already trusts. Then test the fit.

Start from your customers, not from a partner directory. Ask each one who they call before they buy. The same three or four names will come back.



Start every partner as an introducer. One page, paid on cash.

Pick the model by who carries the sale. At seed you keep the contract, the billing and the customer data; you give up margin only where a partner does work you cannot.

MODEL	WHO DOES WHAT	WHAT THEY EARN	USE IT WHEN
Introducer	Partner introduces; you sell, contract, bill and support	10% of first-year ACV for a warm introduction; 20% for a qualified opportunity	Always first: 90 days, two partners
Reseller	Partner sells on its own paper and holds the contract	20–30% margin where the partner carries the sales cycle; 25–40% fully on its paper	The buyer can only buy through them
Implementation	Partner delivers around your product and bills the client	No licence margin; the services are its income, typically 10–20% of the deal	The product needs delivery you will not staff

Ranges: J. Lemkin, SaaStr (fees on first-year ACV); Bessemer Venture Partners partner-programme guide, via eChai Ventures. Checked 23/10/2026. Pay at the low end until a partner has delivered two customers.

THE ONE-PAGE AGREEMENT	
ICP and disqualifiers	the lead contract's, word for word
Deal registration	in your CRM; first registered wins; lapses at 90 days without a meeting
Fee	on first-year billed ACV; paid within 30 days of the customer's payment
Exclusivity	none at seed; if forced, one niche, one year, with a minimum
Customer and data	you hold the contract; contacts shared lawfully, controller roles written down
Name and logo	used only with the partner's and the client's permission
Term	12 months, 60 days' notice; fees on registered deals survive

DO THIS NOW	1 Offer the introducer model to the two partners CEO · week 5 Done when: the one-page agreement sent to both	2 Set the fee and the cash rule CEO with whoever does the numbers · week 5 Done when: fee in the budget and in CAC; paid after the customer pays	3 Turn on deal registration in the CRM Marketing owner · week 5 Done when: partner source, registration date and 90-day lapse on every deal	4 Sign, then review at 90 days CEO and partner · day 90 Done when: scale, fix or end each partner, on the registered deals

A partner is a channel with an owner. Run it like one.

Partners sell what is easy to explain and safe to recommend. Make it both, give them one person to call, and hold the same rhythm you hold for every other channel.

Who and how much

One owner

the CEO at seed; a partner manager only once partners bring a third of pipeline

At most three active

until one partner has delivered two customers

Costed

fees, the owner's hours and the kit go in the budget and in CAC

What you hand over

The value story

one page, in the client's numbers

Who to introduce

the ICP, the trigger and the "we do not sell to" list

A ready introduction

a three-line email they can forward as it stands

Proof

one case study and the trust pack

The rhythm

Every introduction

validated on arrival; acknowledged to the partner the same day

Monthly, 30 minutes

registered deals, next steps, what the partner is hearing

Quarterly

results against the agreement; scale, fix or end

On the scoreboard

partner leads on their own line, never mixed with outbound

DO THIS
NOW

1 Name the partner owner

CEO · this week

Done when: one name in every partner agreement and record

2 Build the partner kit

Marketing owner · week 6

Done when: value story, ICP card, forwardable email, case study, trust pack

3 Book the monthly call with each partner

Partner owner · week 6

Done when: recurring, 30 minutes, agenda in the invite

4 Add the partner line to the Friday scoreboard

Marketing owner · week 6

Done when: partner leads, registered deals and fees owed, by partner

A partner risks their name on you. Equip them to do it safely.

Six things a good partner will ask for. Have the **day-one** items ready before the first introduction; build the rest as the partner earns it, by their second registered deal.

	Commercial certainty DAY ONE The one-page agreement, the fee schedule and how fees are calculated DAY ONE Deal registration that protects their introductions for 90 days DAY ONE Your price list and what is negotiable, so they never quote blind BY DEAL 2 A statement of fees earned and owed, every month	Sales kit DAY ONE One-page value story and the ICP card with the “we do not sell to” list DAY ONE A forwardable three-line introduction email BY DEAL 2 A short partner deck they can present without you BY DEAL 2 Discovery questions, objection answers and an ROI calculator	Proof DAY ONE One case study in the client’s numbers DAY ONE A customer who will take a reference call BY DEAL 2 A recorded demo and a sandbox they can show BY DEAL 2 Co-written case studies of their own clients, credited to them
	Trust and compliance DAY ONE The trust pack: security, data protection, data residency, AI use DAY ONE Your DPA and who is controller and processor for shared contacts BY DEAL 2 Insurance certificates: professional indemnity and cyber BY DEAL 2 A roadmap briefing under NDA, so they never promise what is not coming	Delivery and support DAY ONE A named technical contact and an escalation path with response times BY DEAL 2 Implementation guide, integration docs and API access BY DEAL 2 Training for their delivery staff; a certificate if they implement BY DEAL 2 Early notice of product, pricing or policy changes: 30 days	People and rhythm DAY ONE One named owner who answers the same working day DAY ONE The CEO on every first deal BY DEAL 2 A joint plan: named target accounts and the next two introductions BY DEAL 2 Monthly pipeline call and a quarterly review with results
	DO THIS NOW	1 Build the day-one kit Marketing owner · before the first introduction Done when: all twelve day-one items in one shared folder, sent with the agreement	2 Name the technical contact CEO · this week Done when: a name and response times written into the agreement
		3 Brief each partner on the roadmap CEO · at signing Done when: under NDA; what is coming, and what is not	4 Build the rest by deal 2 Partner owner · by the second registered deal Done when: partner deck, demo, sandbox, training and fee statement in place

Their trust is the asset. Guard it above any deal.

Every introduction is a partner putting their name on you. Treat each one as a deposit you must repay with an outcome.

DEPOSITS · WHAT BUILDS IT

- ✓

Qualify their introductions as hard as your own
Outside the ICP or below the floor: decline, and tell the partner why, the same day
- ✓

Over-deliver the first deal
The CEO on every first deal from a new partner, start to finish
- ✓

Tell the partner first
Bad news within one working day, before their client hears it
- ✓

Keep them in the room
Copied on the plan, invited to the review, credited in the case study
- ✓

Pay on time, every time
Within 30 days of the customer’s payment, without being asked
- ✓

Protect their income
Never undercut their price or take their services work

WITHDRAWALS · WHAT ENDS IT

- ✗

Going around the partner to their client
- ✗

Selling the client something they did not ask for
- ✗

Promising in the first meeting what the pilot cannot show
- ✗

A pilot that fails with no warning to the partner
- ✗

A late or disputed fee
- ✗

Approaching their other clients, or their staff, directly

DO THIS NOW

- 1

Write the partner charter: the six deposits
CEO · before the first introduction

Done when: one page, sent to each partner with the agreement
- 2

Put the CEO on every first deal
CEO · every new partner

Done when: CEO named on the deal record from introduction to go-live
- 3

Set the one-working-day rule for bad news
Partner owner · now

Done when: rule in the charter; every slip told to the partner first
- 4

Ask each quarter: did we cost you any trust?
CEO · every quarter

Done when: the answer logged; anything flagged fixed before the next introduction

The more a partner sells, the more they earn. On cash.

Three tiers, set on the billed and collected revenue a partner has brought in over the last twelve months. Each step up raises the fee and adds what helps them sell more. Reviewed every quarter, both ways.

TIER 1

Registered

Every new partner

Signed agreement; day-one kit received

10%

warm intro

20%

qualified opp.

£9,000

per £45k customer, qualified

· The day-one kit and deal registration

· A named owner; the CEO on the first deal

· Listed on your partners page once they have a customer

TIER 2

Proven

Two customers, or £90k of first-year value collected

Trailing twelve months; no trust breaches

15%

warm intro

25%

qualified opp.

£11,250

per £45k customer, qualified

Everything in Registered, plus:

· Partner deck, demo, sandbox and staff training

· One joint webinar or event a year, paid by you

· Co-written case study; roadmap briefing

TIER 3

Strategic

Five customers, or £225k of first-year value collected

Trailing twelve months; a joint plan signed

20%

warm intro

30%

qualified opp.

£13,500

per £45k customer, qualified

Everything in Proven, plus:

· A joint business plan and quarterly executive review

· First introduction to each new niche you open

· A reseller option at 25–30% margin if they want to hold the contract

· A seat on your customer advisory group

THE RULES

Cash, not contracts

Tiers count billed and collected first-year value; pilot and set-up fees count for nothing

Reviewed quarterly

On the trailing twelve months; a partner can move down as well as up

Trust gates every tier

Introductions outside the ICP, or promises we cannot keep, cost a tier

Costed in CAC

Higher tiers cost more per customer than Quoinstone's £10,103 CAC; keep them only while those deals close faster or more often

DO THIS NOW

1

Write the three tiers into the agreement

CEO · before the second partner signs

Done when: thresholds, fees and benefits on one page

2

Set thresholds from your own ACV

CEO with whoever does the numbers · week 1

Done when: Proven at two customers, Strategic at five, in your currency

3

Run the tier review every quarter

Partner owner · each quarter

Done when: each partner's trailing twelve months and tier, logged

4

Compare partner CAC with blended CAC

CEO · each quarter

Done when: fees per partner customer against CAC; tiers kept or reset

One job. One number. Every Friday.

TAKE IT AND USE IT

1

Founders

Sign the lead contract. Pick the beachhead. Publish the five lines on Friday. Everything else is the machinery, and the playbook has it.

2

Whoever owns marketing

You are measured on counted leads per month against the contract, and on their quality. Everything else you do is in service of that.

3

Tell us what breaks

Which definitions do not survive your market, where the thresholds are wrong, and what your first ninety days taught you. The next version is built from that.