REILLY
SALES CONSULTING

SAAS REVENUE ENGINE

V 1.0

A STRATEGIC TOOLKIT FOR SCALING SAAS REVENUE

REILLY
SALES CONSULTING

SAAS REVENUE ENGINE

Welcome to the SaaS Revenue Engine Toolkit — your blueprint for scaling SaaS revenue efficiently. This toolkit provides actionable strategies to:

- Optimize SDR to AE handoffs
- Enhance forecasting accuracy
- Implement scalable pipeline rhythms

These are some of the guides and templates we use in the field to bring our clients to their next stage of evolution. These are mainly frameworks that need to be tailored to your unique business. Dive into them. Make them yours.

Whether you're a startup or an established SaaS company, these tools are designed to drive predictable growth.

TABLE OF CONTENTS

GTM DIAGNOSTIC SCORECARD

FIND THE LEAKS, FIX THE LAG, AND FOCUS YOUR SALES TEAM WHERE IT MATTERS

Audience: CROs, revenue leads, founders, sales ops teams at SaaS companies

What It's For:
This scorecard helps SaaS leaders **identify friction in their revenue engine**—before it tanks a quarter. It gives them a fast, no-fluff diagnostic across GTM functions, so they know *where to optimize first*.

How To Use It:
Grade each of these five pillars every quarter. This will give you a roadmap for constant improvement, and identify the areas to focus on first.

GTM DIAGNOSTICS SCORECARD — 5 PILLARS

1. Pipeline Generation

Statement	Rating
We consistently generate 3–4x pipeline coverage for quota.	🔴 / 🟡 / 🟢
Outbound is producing SQLs (not just booked calls).	🔴 / 🟡 / 🟢
Inbound leads are ICP-fit and converting >15% to opps.	🔴 / 🟡 / 🟢
SDRs or AEs are using structured outreach sequences.	🔴 / 🟡 / 🟢
Channel mix is diversified (not 1 source dominating).	🔴 / 🟡 / 🟢

📌 If you have more than 3 red or yellow flags then focus on lead generation repair next quarter.

2. Sales Execution

Statement	Rating
Reps follow a consistent sales process with clear exit criteria.	🔴 / 🟡 / 🟢
Discovery consistently surfaces use case, urgency, budget.	🔴 / 🟡 / 🟢
Win rate on qualified opps is >25%.	🔴 / 🟡 / 🟢
Sales cycle length is trending down, not up.	🔴 / 🟡 / 🟢
Deal reviews are strategic, not just pipeline roll calls.	🔴 / 🟡 / 🟢

📌 If win rates are less than 20% then discovery + proposal flow likely need fixing.

3. Buyer Alignment

Statement	Rating
Personas are clearly defined (titles, triggers, objections).	🔴 / 🟡 / 🟢
Messaging speaks to business outcomes, not just features.	🔴 / 🟡 / 🟢
Reps can tailor pitch by vertical, use case, and role.	🔴 / 🟡 / 🟢
Sales + marketing use the same ICP definition.	🔴 / 🟡 / 🟢
Customer success confirms post-sale alignment on use case.	🔴 / 🟡 / 🟢

📌 Misalignment = leaky funnel + high churn risk.

4. Revenue Ops & Forecasting

Statement	Rating
CRM accurately reflects current deal status.	🔴 / 🟡 / 🟢
Forecasting is within 10–15% accuracy.	🔴 / 🟡 / 🟢
You have clear exit criteria per stage in your pipeline.	🔴 / 🟡 / 🟢
Sales enablement materials are used and updated.	🔴 / 🟡 / 🟢
Win/loss data is collected and reviewed monthly.	🔴 / 🟡 / 🟢

📌 RevOps hygiene = your scaling insurance policy.

5. Retention & Expansion Readiness

Statement	Rating
CS is looped into deals before close.	🔴 / 🟡 / 🟢
Expansion conversations are triggered by usage or success milestones.	🔴 / 🟡 / 🟢
You know your expansion LTV by cohort.	🔴 / 🟡 / 🟢
Churn risks are flagged >30 days before renewal.	🔴 / 🟡 / 🟢
AMs have structured QBR or check-in templates.	🔴 / 🟡 / 🟢

📌 If you're winning but not retaining then revisit success criteria and onboarding clarity.

Scorecard Outcome Recommendations

- 🔴 **Red Flags** = Prioritize this zone next sprint or quarter
- 🟡 **In Progress** = Monitor + add coaching/support
- 🟢 **Green** = Scale what's working + automate where possible

📌 **Pro Tip:**
You don't need to "fix everything." You need to find the 1–2 red zones that will unblock 80% of growth friction—**this scorecard gives you the roadmap.**

SAAS MESSAGING & ICP GRID

NAIL YOUR NARRATIVE FOR EVERY BUYER—SO YOUR PITCH LANDS EVERY TIME

Audience: Founders, AEs, sales enablement leads, GTM teams

What It's For:
SaaS teams often pitch features before pain, or copy messaging from competitors. This framework helps you **build a clear, repeatable narrative** that maps your product to each buyer's goals, role, and urgency.

SAAS MESSAGING FRAMEWORK

🔷 Core Structure (Use in Decks, Calls, Campaigns)

1. Identify the problem

"What's the painful, inefficient, or risky thing your ICP is doing today?"

Example: "CS teams are drowning in low-signal tickets, and churn is rising because the real issues get buried."

2. Implication

"How does this affect their business, revenue, or bottom line? What's the cost of ignoring it?"

Example: "For most mid-market SaaS teams, churn over 10% wipes out 60% of new growth."

3. Solution

"How do we solve this problem, in plain language."

Example: "We help CS teams spot churn risk 30 days earlier—using AI to surface customer sentiment and usage gaps."

4. Differentiator

"How are we different—and why does that difference matter?"

Example: "Unlike ticketing platforms, we connect usage + sentiment to trigger proactive plays—before the ticket is even filed."

5. Proof

"Make it believable—fast."

Example: "Clients like Mercury, Collab, and JumpCloud cut churn by 15% in 60 days."

ICP PERSONA GRID TEMPLATE

ICP Persona	Title(s)	Their Pain	Their Trigger	Your Hook
CS Leader	VP of CX, Head of Support	Too reactive, missing expansion signals	NPS dropping, churn spike, team at capacity	"Get proactive with churn—not buried in tickets."
RevOps	RevOps Lead, BizOps	Sales insights stuck in silos	Poor close rates, slow onboarding	"One view of the customer—before and after the sale."
Head of Product	Dir of Product, CPO	Can't prioritize roadmap with user data	Feature churn, low usage	"See what users actually do—not just what they say."

✅ Fill this out for each core vertical or segment

Value Prop Templates (Fill-In-the-Blank)

"We help [ICP] solve [pain] so they can [business outcome], without [common blocker]."

Ex: "We help customer success teams reduce churn by 20%—without waiting for angry tickets to surface risk."

📌 **Pro Tip:**

If your messaging works only when *you're in the room*, it won't scale. This framework gives every rep a **clarity kit**—so buyers feel seen before they hear the demo.

SAAS SALES STAGE EXIT CRITERIA BUILDER

DEFINE EXACTLY WHAT "QUALIFIED" MEANS—SO REPS STOP GUESSING AND FORECASTING STOPS FAILING

Audience: Sales managers, RevOps leads, CROs, AEs at SaaS companies

What It's For:
You can't scale a sales process if no one agrees on when a deal is truly "qualified." This builder helps you create **clear, observable exit criteria** for every sales stage—so pipeline is clean, coaching is consistent, and forecasts don't blow up.

SALES STAGE EXIT CRITERIA BUILDER

How to Use It

1. Map your current pipeline stages
2. Use the criteria prompts below to define what MUST be true to exit each stage
3. Set a Pipeline Value % factor per stage
4. Implement inside your CRM and sales manager 1:1s
5. Audit monthly for consistency and rep clarity

TEMPLATE FRAMEWORK

Stage	Exit Criteria (Must Be True)	Forest Value %
Discovery / Qualifying		

EXIT CRITERIA EXAMPLES:

1. Discovery / Qualifying:

- Confirmed ICP match (title, company size, industry)
- Problem clearly stated by prospect
- Buyer has urgency or is open to solving
- Call occurred (not just booked)
  ✅ No guesswork—if no call, it's not a qualified lead

2. Demo / Value Presentation:

- Prospect saw tailored use case
- Objections or hesitations surfaced
- Next step confirmed (pilot, pricing, stakeholder loop-in)
  ✅ "Let me think about it" = not a stage advance

3. Proposal / Evaluation

- Pricing sent and acknowledged
- Internal process shared (procurement, legal, etc.)
- Decision-makers identified
  ✅ No ghosted proposals—must have buyer signal

4. Negotiation / Verbal Commit

- Verbal agreement on pricing and timing
- Contract redlines underway
- Buyer committed to a go-live date or onboarding window
  ✅ No "I think they'll sign" without timeline commitment

5. Closed Won

- Contract signed
- Onboarding kick-off scheduled or delivered
- Handoff to CS initiated

Closed Lost

- Reason categorized
- Feedback collected (if possible)
- Contact marked for future re-engagement

✅ Use 2–4 criteria max per stage to avoid friction

📌 **Pro Tip:**
If your forecast relies on "gut feel," you're flying blind. Exit criteria = **the operational definition of momentum.** It makes every stage coachable and every deal measurable.

SAAS SALES FORECAST & HEALTH TRACKER

PREDICT REVENUE WITH CONFIDENCE—AND KNOW WHICH DEALS ARE REAL

Audience: CROs, Sales Managers, RevOps leads, Founders

What It's For:
This tool helps SaaS teams **move beyond "gut-feel" forecasting**. It gives you a structured way to project revenue, spot risk, and coach reps using real signals—not hopeful spreadsheets or last-minute scrambles.

SaaS Forecast Template Structure

STEP 1: DEFINE SALES STAGES & EXIT CRITERIA

Stage	Exit Criteria	Forecast Value %
Prospect	Expresses a relevant paint point and interest in a solution	0%
Lead	Has committed to an appointment with an AE	10%
Discovery	Pain verified, access to decision-maker, timeline known	30%
Demo Complete	Live product shown, verbal interest, needed ROI data acquired, decision process & criteria known	40%
Proposal Sent	Pricing shared, technical fit confirmed	60%
Verbal Commit	Economic buyer buy-in, deal path mapped, all details required for SOW known	70%
Negotiation	Ts&Cs, pricing, SOW agreed on by both parties	80%
Closed Won	Contract signed	100%

STEP 2: INCORPORATE MANAGER CONFIDENCE MODIFIER (OPTIONAL)

Add rep input using a 1–5 deal confidence score → blend this with stage weight to enhance precision.

Deal Confidence Score (1–5)	Add/Subtract %
5 = Fully locked in	5%
4 = Strong signals	0%
3 = Medium confidence	-5%
2 = At risk	-10%
1 = Likely dead	-20%

🧠 Now you have stage weighting + rep reality in one number.

STEP 3: BUILD YOUR FORECASTING TABLE

Core Forecasting Table (Editable Google Sheet or CRM Export)

Deal Name	AE	Stage	Close Date	Value	Mgr Confidence	Forecast Value
Acme Demo Platform	Jess	Negotiation	June 12	$24,000	5%	$20,400
RocketOps	Kai	Proposal	June 30	$15,000	-10%	$7,500
NeonStack	Rae	Discovery	July 10	$32,000	-20%	$3,200

✅ Forecast Value = Deal Value × (Stage Forecast Value % + Manager Modifier)

STEP 4: ADDITIONAL TABLES (OPTIONAL)

- Monthly forecast vs. actual
- Forecast by rep, product line, or stage
- Win rate by forecast category
- Deal slippage tracking (week-to-week movement)
- Forecast accuracy % (last 3 months)

STEP 5: FORECAST BY SEGMENT + REP

Slice by:

- Rep
- Industry
- Deal size tier
- Time to close (cycle length)

STEP 6: USE CHARTS TO VISUALIZE:

Forecast vs. quota

Forecast by source

Deal aging by stage

📌 **Pro Tip:**

Stop treating your forecast like a wish list. This template helps you **coach with data**, not drama—and make pipeline reviews actually useful.

📌 **Pro Tip:**

Never run pipeline reviews just on *deal size*. Weight your forecast using behaviour and buyer intent—because reality lives in the signal, not the CRM stage.

SAAS SALES METRICS DASHBOARD

TRACK WHAT ACTUALLY DRIVES REVENUE—NOT JUST ACTIVITY

Audience: RevOps leaders, founders, CROs, data-driven sales managers

What It's For:
Most SaaS teams track *vanity metrics* (calls made, demos booked) instead of *conversion levers*. This dashboard focuses on full-funnel performance metrics that predict—and accelerate—growth.

SAAS SALES METRICS DASHBOARD (CORE METRIC CATEGORIES)

1. TOP-OF-FUNNEL METRICS

Track lead velocity + SDR effectiveness.

Metric	Definition	Target
Lead Volume (Weekly)	Total new leads added	Based on capacity planning
Outbound Connect Rate	% of touches that result in conversation	8–12% (varies by channel)
Meeting Set Rate	% of connects that result in booked meeting	15–25%
Show Rate	% of booked meetings that happen	70–85%

✅ Flag: If show rate is less than 70%, look at ICP fit or message-to-problem match

2. DISCOVERY & DEMO METRICS (AE ZONE)

Track buyer engagement + rep execution

Metric	Definition	Target
Discovery to Demo Conversion	% of discovery calls that progress to demo	60–75%
Proposal Sent Rate	% of demos that result in proposal	50–65%
Deal Velocity	Days from first call to closed-won	SaaS avg: 30–90 days
Close Rate	% of qualified opps that close	18–35% (depending on ACV)

✅ Flag: If Proposal to Close conversion is less than 30%, investigate:

– Pricing clarity
– Stakeholder access
– Decision timeline gaps

3. SALES PRODUCTIVITY METRICS

Track rep-level efficiency + output

Metric	Definition	Target
Ramp Time	Days to 80% quota for new hires	45–90 days
Quota Attainment Rate	% of reps hitting target	65–75%
Revenue per Rep	Total new ARR per head	Compare monthly vs. rolling 90-day
Talk Time per Day	Time in meaningful convos	90+ mins/day = healthy

4. UNIT ECONOMICS SNAPSHOT

Track system-level efficiency

Metric	Definition	Target
CAC (Cost to Acquire Customer)	Total spend / new customers	LTV:CAC = 3:1+
Sales Cycle Length	Avgerage days to close	<60 for <$15K ACV
Win Rate by Channel	% of leads closed by source	Compare Paid vs. Outbound vs. Inbound
Churn Flag	% of customers dropping in <90 days	Track by AE + segment

Bonus View: Weekly Ops Summary Panel:

- Total pipeline created
- Pipeline coverage ratio (pipeline vs. target)
- Avg deal size (by rep + industry)
- Forecast confidence score (1–5 scale)
-

📌 **Pro Tip:**

Use this dashboard in weekly RevOps meetings. Don't just report—*decide what to adjust*. Metrics should trigger action, not just observation.

LEAD QUALIFICATION MATRIX

SCORE YOUR PIPELINE WITH PRECISION—SO YOUR REPS STOP CHASING GHOSTS

Audience: SDRs, AEs, RevOps, sales managers, GTM leads

What It's For:
Reps waste hours chasing "maybe" leads that were *never qualified to buy*. This matrix helps your team instantly identify which leads to prioritize, which to nurture, and which to drop—*without gut feel*.

THE LEAD QUALIFICATION MATRIX (SAAS EDITION)

STEP 1: SCORE USING THE FITS MODEL

A simple 4-point scoring system based on the core conversion signals:

Criteria	Explanation	Score 1–3
Fit	Do they match our ICP? Industry, size, tech stack?	
Impact	Do they have a high-value use case or pain?	
Timeline	Is there a buying window or known urgency?	
Stakeholders	Do we have access to the decision-maker(s)?	

Total Possible Score: 12

Interpretation:

- 10–12: **Green Zone** -**Fast track** → High-priority opportunity
- 7–9: **Yellow Zone** - Nurture and pressure test
- <7: **Red Zone**- Slow play or disqualify

STEP 2: APPLY THE 3-BOX FILTER FOR PIPELINE CLARITY

Category	Definition	Action
Red Zone	Low Fit + No Impact + No Urgency	Drop or push to nurture sequence
Yellow Zone	Decent Fit but missing urgency or access	Keep warm + monitor for trigger
Green Zone	Strong Fit + Impact + Buying Motion	Priority focus + manager coaching

Coaching Prompts for Qualification Conversations

- "What happens if they don't solve this in 3 months?"
- "What internal metric or OKR does this affect?"
- "Who will say yes—and who could block this?"
- "What just changed in their world that made this relevant *now*?"
- What is their decision process and criteria?
- How is this problem affecting their revenue or profit?
- What is the ROI on this project?
- How long has this been a problem?
- Is this a top-down, or bottom-up initiative?
- What have they already tried to fix this?

SAMPLE LEAD SCORECARD

Lead	Fit	Impact	Timeline	Stakeholder	Total	Priority
ACME Corp	3	3	2	3	11	Green Zone
BetaSys	2	2	1	2	7	Yellow Zone
LegacyCo	1	1	1	1	4	Red Zone

📌 **Pro Tip:**

Run this matrix in pipeline reviews—*not just discovery*. It keeps the whole org focused on real revenue, not rep optimism.

SAAS SALES PROCESS AUDIT CHECKLIST

IDENTIFY EVERY HIDDEN BOTTLENECK IN YOUR SALES MOTION—FROM SDR TO CLOSE

Audience: CROs, Revenue Ops, Founders, Sales Managers

🧠 **What It's For:**

Scaling SaaS teams often lose deals—not from bad reps—but from process leaks. This checklist helps you isolate what's breaking your revenue engine.

Part 1: SDR/BDR Process Health

◻ Do reps have a documented ICP, with psychographic triggers and disqualifiers?
◻ Is your outreach sequence mapped by buyer stage and persona?
◻ Are connects and conversion to meetings tracked by rep, channel, and industry?
◻ Are messaging variations being A/B tested regularly?

Part 2: Handoff to AE

◻ Is there a formal qualification/handoff doc or checklist between SDRs and AEs?
◻ Are no-show rates or low-fit demos being tracked and triaged?
◻ Do AEs rate lead quality or provide structured feedback?

Part 3: AE Sales Execution

◻ Do AEs follow a shared discovery framework with documented outcomes?
◻ Are demo flows standardized but flexible by persona/problem type?
◻ Are next steps locked with time/date in 80%+ of calls?
◻ Is pricing framed contextually (value, not just package list)?

Part 4: Sales Management + Pipeline Hygiene

☐ Are stages clearly defined with exit criteria?
☐ Are pipeline reviews coaching opportunities—not just number reviews?
☐ Is win/loss feedback captured per deal (especially losses)?
☐ Is CRM data auditable, clean, and inspection-ready?

Part 5: Strategy & Scalability Readiness

☐ Is there a playbook that can be handed to new hires and ramp them in 30–45 days?
☐ Can you quantify the ROI of your sales process in LTV:CAC or rep productivity?
☐ If your top 2 reps left today—would the system still sell?

Scoring System (Optional)

Give each item a score from 1–5 (1 = broken, 5 = optimized).

Total 60–75? - You're scaling-ready.
Total 45–59? - Time to tighten.
Below 45? - You're bleeding deals—fast.

📌 **Pro Tip:**

Use this audit with your RevOps or founder team on a whiteboard. Highlight all 2s and 3s in red—those are your first revenue lifts.

WIN/LOSS REVIEW FRAMEWORK

TURN EVERY CLOSED DEAL—WON OR LOST—INTO A REVENUE LESSON

Audience: Sales managers, RevOps leads, founders, enablement teams

What It's For:
Most SaaS teams chase the next deal and never learn from the last. This framework helps you **capture patterns, sharpen positioning, and coach smarter** by doing fast, structured win/loss reviews—without blaming reps or wasting time.

All feedback should be directly from your clients. Do not ask the rep for their opinions. They probably won't be accurate.

WIN/LOSS REVIEW FRAMEWORK — CORE STRUCTURE

STEP 1: CHOOSE YOUR SAMPLE SET

✅ Prioritize:

- Closed-won and closed-lost deals from last 30–60 days
- Deals where there *was* engagement—not total no-shows
- Mixed rep performance (top, mid, new)

Tip: 3–5 deals/month = plenty for pattern spotting

STEP 2: CLIENT INTERVIEW SAMPLE QUESTIONS:

Decision Drivers

- "What were the top 2–3 reasons you chose to buy / passed?"
- "Which part of the buying journey made the biggest impact?"

Evaluation Process

- "Who else was involved in the decision?"
- "What alternatives did you consider?"
- "How did pricing factor into the decision?"

Messaging Clarity

- "Was anything confusing or unclear in our pitch or materials?"
- "How well did we connect the product to your actual goals?"

Product Fit

- "Did we miss any key features or concerns?"
- "What's one thing that would've made this a no-brainer?"

STEP 3: ANALYZE & TAG RESULTS

Theme	Notes
Lost to Competitor	3x mentions of stronger integrations
Messaging Gap	Buyers didn't understand usage-based pricing
Sales Process Breakdown	2x prospects said "too many follow-ups, unclear steps"
Objection Missed	Pricing timing issue surfaced late

✅ Use tags like: #integration, #urgency, #timeline, #handoff, #CSAlignment

STEP 4: REPORT & ACT

Include in monthly GTM sync:

- Top 3 win/loss themes
- Buyer quotes (anonymized)
- Deal examples (linked)
- Recommendations by function (examples):
    - 🟢 Sales: update objection handling
    - 🔵 Product: flag roadmap input
    - 🟠 Marketing: revise one-pager
    - 🔴 Enablement: coach demo story structure

📌 **Pro Tip:**

The smartest SaaS teams don't just win more—they **learn faster.** Your win/loss review is where *revenue intelligence meets humility.*

SAAS SALES PLAYBOOK TEMPLATE

STANDARDIZE HOW YOUR REPS SELL—WITHOUT SCRIPTING THEIR SOUL

Audience: Sales managers, enablement leads, founders, RevOps teams

🧠 **What It's For:**

A sales playbook isn't a rulebook—it's a **scaling system**. This template helps you create a lean, high-impact playbook that aligns your sales team without turning them into robots.

SAAS SALES PLAYBOOK TEMPLATE — MODULAR STRUCTURE

SECTION 1: INTRODUCTION: WHO THIS IS FOR

"This playbook is built for AEs and SDRs selling [Product] to [ICP].
It's designed to give you a consistent process that scales—but still leaves room for judgment, creativity, and human conversation."

✅ Set expectations: This is a framework, not a script

SECTION 2: SALES PROCESS OVERVIEW (STAGE MAP)

Stage	Description	Owner
Discovery	Initial call to confirm fit + pain	AE
Demo	Product walkthrough tailored to use case	AE
Proposal	Share pricing + handle objections	AE
Verbal Commit	Final prep + legal/procurement	AE
Closed Won	Contract signed + handoff	AE → CS

✅ Include visual pipeline map

SECTION 3: POSITIONING & NARRATIVE

Core Messaging:

- Problem we solve
- Who we're for (ICP profile)
- How we're different

"We help [ICP] go from [pain] → [outcome] by fixing [process gap]."

Customer Sound Bites:

- "What customers say before they buy"
- "What they say after implementation"

SECTION 4: BUYER JOURNEY MAP

Stages:

1. Problem Awareness
2. Exploration
3. Evaluation
4. Buy-In
5. Close
6. Onboarding Handoff

Sales Actions by Stage:

- Discovery → Demo → Proposal → Verbal → Close
- Align to buyer triggers + internal friction

SECTION 5: SALES MOTION BREAKDOWN

By Role:

Role	Key Activities	Success Metrics
SDR	Prospecting, outreach, booking, handoff	Meetings set, opps created, opps closed
AE	Discovery, demo, close	Win rate, cycle time, revenue
RevOps	CRM, reporting, coaching	Forecast accuracy, data hygiene

By Stage (Pipeline):

Stage	Goal	Exit Criteria
Discovery	Identify pain + access	Urgency confirmed, access to buyer
Demo	Align need to solution	Interest confirmed, next step booked
Proposal	Confirm value + budget	Technical fit, pricing alignment
Verbal	Lock deal	Deal desk cleared, verbal yes
Close	Paper process complete	Contract signed

SECTION 4: OBJECTION HANDLING LIBRARY

By Category:

- Budget
- Timeline
- Competition
- Internal Buy-In

Top Objections + Reframes:

Objection	Reframe
“Too expensive”	“Compared to what? Let’s map cost of delay.”
“We’re already using X”	“Awesome—what’s missing or frustrating?”
“We’re not ready yet”	“What’s the risk of waiting another 90 days?”

✅ Use real call snippets or peer examples

SECTION 5: QUALIFICATION + PRIORITIZATION

Use **FITS Model** (Fit, Impact, Timeline, Stakeholder)

- Score every deal
- Categorize by pipeline quality

Weekly pipeline review = “What’s real? What’s noise?”

SECTION 6: DISCOVERY QUESTIONS BY PERSONA

Persona	Questions
RevOps	“What tools are you currently using to track pipeline health?”
CS Leader	“What does your team flag as early churn indicators?”
CTO	“What integration or data security concerns do you anticipate?”

✅ Tailor for SDRs vs AEs where needed

SECTION 5: PROPOSAL & PRICING FRAMEWORK

- Standard packages
- What's negotiable (and what's not)
- What we can ask for in exchange for concessions
- Proposal template walkthrough
- Discounting guardrails

✅ Include example: $6K–$12K ACV deal framing by segment

SECTION 6: CALL FRAMEWORKS & SCRIPTS

Call Flows & Demo Anchors

Call	Flow
Discovery	Intro → Context → Pain → Impact → Close for next step
Demo	Recap → Show only what matters → Objection checkpoint → CTA
Pilot Handoff	Summary → Timeline → Risk reduction → Success criteria

Discovery Call:

- Problem prompt → Pain deep dive → Impact anchoring
- 3–4 key questions tied to outcomes

Demo Flow:

- Start with value
- Feature only in service of use case
- Close with recap + decision clarity

SECTION 7: COACHING CADENCE

Cadence	Activity
Weekly	1:1 with manager (deal review + skill)
Biweekly	Call review / team coaching
Monthly	Forecast review + retro

📌 **Pro Tip:**

Put this playbook in **Notion, Confluence, or Guru**—not a PDF graveyard. Make it *searchable*, *visible*, and *evolving* with the team.

📌 **Pro Tip:**

Your playbook is **a living document.** Version it. Coach to it. And let reps give feedback to make it sharper over time.

SDR/AE HANDOFF & ALIGNMENT PLAYBOOK

ELIMINATE FRICTION, BOOST CONVERSIONS, AND TURN BOOKED MEETINGS INTO CLOSED DEALS

Audience: Sales managers, SDR leaders, AEs, RevOps teams at scaling SaaS orgs

🧠 **What It's For:**
Most revenue leaks happen between **SDR handoff and AE ownership.** This playbook helps SaaS teams tighten the baton pass, increase show rates, and boost opportunity-to-close conversion.

SDR/AE HANDOFF & ALIGNMENT PLAYBOOK

The Problem:

1. SDR books the meeting...
2. AE shows up cold...
3. Prospect ghosts or stalls post-call.

Fix this by building shared accountability, clean data, and a consistent experience.

STEP 1: DEFINE THE HANDOFF TRIGGERS

Trigger	Owner	Notes
Meeting Booked in Calendar	SDR	Use AE's link + custom subject line
CRM Stage Advanced (Pre-Qualified)	SDR	Add discovery notes in "notes" field
Intro Email Sent	SDR	CC AE w/ context
Internal Deal Slack/CRM Ping	SDR	Mention buyer role, pain, urgency

Bonus: Include example message blurbs or template language

STEP 2: ALIGN ON QUALIFICATION CRITERIA

Minimum Info SDR Must Collect Before Handoff:

- ICP Match (title, vertical, company size)
- Pain signal or trigger (why now?)
- Urgency window (timeline to explore or buy)
- Role in buying process (DM, evaluator, gatekeeper)
- Confirmation of meeting intent (vs. no-show risk)

Use a "Handoff Checklist" inside your CRM or Google Form

STEP 3: AE WARM-UP FLOW

Task	Owner	Timeframe
Review SDR notes in CRM	AE	Within 24h of meeting
Send pre-call confirmation email	AE	24–48h before
Prep 1 custom insight or case study	AE	Before call
Attend 2 SDR calls/month for alignment	AE	Ongoing

Tip: Make AE warm-ups **repeatable**, not heroic.

STEP 4: JOINT AE–SDR PIPELINE SYNC (WEEKLY)

30-Min Meeting Agenda:

1. Top 3 opps created by SDRs → how they're progressing
2. No-shows or rebooks → why, and how to reduce
3. Feedback loop → "What's converting?"
4. Messaging calibration (email, openers, call open)
5. Celebrate booked > show > pipeline > win % success

CONVERSION BOOSTING EXTRAS

- Record SDR-to-AE handoff calls (if live transfer)
- Use "handoff recap email" to buyer:

"Great to meet, [AE Name] will walk you through next steps. Here's what we covered so far…"

- Track show rate by SDR → coach for patterns
- Incentivize **pipeline quality**, not just meetings booked

📌 **Pro Tip:**

A booked meeting isn't pipeline—**a clean, confident handoff is.** Get both teams owning the outcome, not just the activity.

SDR/AE PLAYBOOK TEMPLATE

ALIGN YOUR TOP-OF-FUNNEL AND CLOSERS WITH A UNIFIED LANGUAGE, RHYTHM, AND MOTION

Audience: Sales managers, heads of revenue, RevOps, SaaS founders

🧠 **What It's For:**

Most SaaS companies split SDRs and AEs with no real connective tissue. This playbook brings both sides of the funnel into one consistent system that improves conversion, messaging precision, and rep efficiency.

SDR/AE PLAYBOOK TEMPLATE

SECTION 1: IDEAL CUSTOMER PROFILE (ICP) SNAPSHOT

Copy Prompt: "Our highest-converting customers share these traits..."

- Industry:
- Company size / team structure:
- Tech stack signals:
- Problem trigger events:
- Psychographic drivers (e.g. "Need to prove value fast," "Own the internal pitch")

SECTION 2: TOP FUNNEL MESSAGING FRAMEWORK

SDRs use this to personalize sequences and live calls.

Cold Email Subject Line Bank

- “Quick idea for [X result] at [Company]”
- “Saw you use [Tool] — here’s a sharper motion”

Talk Track Structure (First Call):

1. **Problem primer**: "Teams like yours usually hit [X friction] around [trigger event]..."
2. **Insight injection**: "What most [role]s miss is that it’s not a pipeline issue—it’s a conversion system issue."
3. **Call to action**: “Worth 15 mins to share how [Client X] fixed this?”

SECTION 3: QUALIFICATION + HANDOFF CRITERIA

Aligns SDRs + AEs on when to pass and how to pass.

Qualification Threshold:

- Authority: Known or inferred
- Need: Pain or clear impact trigger
- Timing: Near-term initiative or trigger
- Fit: Firmographic and contextual fit

Handoff Process:

- Email summary format
- Meeting confirmed by SDR
- Shared Slack/CRM note protocol
- AE preps using summary questions: “What’s their urgency?”, “Who needs to sign off?”

SECTION 4: AE DISCOVERY GUIDE

Used for structured discovery that builds urgency and frames value

The 5 Discovery Focus Areas:

1. Business Impact
2. Team Friction
3. Decision Process
4. Competitive Context
5. Internal Narrative (“How will they justify this internally?”)

Closing Questions to Use:

- “What’s the cost of doing nothing here?”
- “What would success look like in 60 days post-implementation?”

SECTION 5: DEAL PROGRESSION MATRIX

Helps AEs self-diagnose and managers coach consistently.

Stage	Goal	Exit Criteria
Discovery	Confirm urgency + context	Pain quantified + access confirmed
Demo	Align solution to buying triggers	Stakeholder clarity + value framed
Proposal	De-risk pricing	Internal champion confirms positioning
Close	Verbal yes + legal/budget alignment	Paper process known + sponsor buy-in

📌 **Pro Tip:**

Print this playbook and walk it from SDRs to AEs in a live call. Anywhere they're not aligned? That's your next conversion bump.

SAAS EXPANSION PLAYBOOK (CS + SALES)

UNLOCK EXPANSION REVENUE WITH TIMING, INSIGHT, AND TRUSTED HANDOFFS

Audience: Customer success managers, AMs, sales leaders, RevOps teams

What It's For:
Your best source of growth might be **already paying you.** This playbook shows SaaS teams how to turn customer insight into expansion deals—without making CS feel like closers or making AEs chase support tickets.

SAAS EXPANSION PLAYBOOK — 3 PILLARS

1. EXPANSION TRIGGERS TO TRACK (SET ALERTS OR FLAG IN CRM)

Trigger	Why It Matters
🟢 New business unit activated	Signals multi-entity rollout opportunity
🟡 User seats maxed out	Time to offer upgrade or tier shift
🔵 Feature request aligned to premium tier	Opportunity to sell deeper usage
🔴 Support ticket reveals process misfit	Flag to solve via add-on or service
🟠 Usage spikes / API limits hit	Natural path to usage-based plan

✅ Use RevOps or CS tools (e.g. Gainsight, Vitally, HubSpot) to automate flagging

2. EXPANSION EMAIL TEMPLATES

From CSM → Light Handoff

Subject: Noticing something promising...

Hi [Customer Name],

Noticed you hit [trigger]—and teams in your space usually explore [next feature/tier] around this point.

Mind if I loop in [AE Name] for a quick brainstorm?
Could be a fit—or we table it for next quarter. Up to you!

✅ Soft ask. No pressure. Paves the way for AE follow-up.

From AE → Expansion Path Framer

Subject: Based on [CSM Name]'s note...

Hi [Customer Name],

Saw the [trigger] update—teams who hit that milestone often ask:

- "Can we add more users without reconfiguring everything?"
- "What would deeper integration with [System] look like?"

Happy to sketch a few options for you—quick screen share next week?

—

3. CS + SALES EXPANSION PLAY FLOW

Step	Owner	Notes
Trigger identified	CSM	Via tool, QBR, or observation
Logged in CRM + flagged for AE	CSM	Use shared notes or Slack
Intro email sent to customer	CSM → AE	Clear reason, light tone
AE books expansion call	AE	Framed as support, not upsell
Deal tracked in CRM as Expansion	AE	Link to original customer record

✅ Optional: Use a "lightweight success plan" to frame ROI

📌 **Pro Tip:**

Expansion works best when it **feels like support, not sales.** This playbook helps CS and Sales show up as *one team*—focused on customer value, not just quota.

SAAS SALES ENABLEMENT CHECKLIST

EQUIP REPS TO CLOSE CONFIDENTLY—WITH THE RIGHT CONTENT, TOOLS, AND TRAINING AT EVERY STAGE

Audience: Sales enablement leads, RevOps, AEs, GTM managers

What It's For:
SaaS reps don't fail because they're unmotivated—they fail because they're **undersupported.** This checklist ensures every rep has what they need to message, demo, and close deals *without confusion or content scavenger hunts.*

SALES ENABLEMENT CHECKLIST — CORE ENABLEMENT ASSETS

1. TOP-OF-FUNNEL (TOFU) CONTENT

Asset	Use
ICP One-Pagers	Targeted by vertical or persona
Pain-Point Messaging Grids	Key problem → outcome mapping
Cold Email Sequences	By segment, use case, and trigger
Case Study Short Formats	Quote, stat, or slide-sized versions indexed by vertical and solution
LinkedIn Content Packs	Rep-shareable posts with call-to-action
Negotiation Matrix	What we can offer, and what we can ask for in return

✅ TOFU content = awareness + permission to engage

2. MID-FUNNEL (MOFU) CONTENT

Asset	Use
Demo Call Deck	Visual storytelling, not feature dump
Objection-Handling Library	Written + role-playable
Proposal Templates	Modular, pre-approved, easy to customize
ROI / Value Calculator	Excel or web-based for quantifying impact
Video Walkthroughs	90–180 sec for async decision-makers

✅ MOFU content = credibility + clarity

3. BOTTOM-OF-FUNNEL (BOFU) CONTENT

Asset	Use
Competitive Battlecards	Strengths, weaknesses, landmines
Pricing FAQ Sheet	Built to de-risk late-stage hesitation
Implementation Overview	"What happens after we sign?" deck
Legal & Procurement Prep Kit	Timeline + editable doc guide
Expansion Path Preview	What growth with us looks like post-sale

✅ BOFU content = confidence + decision

ENABLEMENT PROGRAM ONBOARDING SEQUENCE (FIRST 30 DAYS)

Week	Focus
Week 1	Product deep dive + top 3 use cases
Week 2	Sales process training + CRM hygiene
Week 3	Objection role-play + demo dry runs
Week 4	Shadow live calls + run simulated close

✅ Bonus: Add "content scavenger hunt" to Week 1—train reps to find assets on their own

CONTENT AUDIT TEMPLATE

Content Piece	Funnel Stage	Owner	Last Updated	Performance
"Churn Crusher" One-Pager	TOFU	Marketing	Mar 2024	31% reply rate
Demo Deck	MOFU	Enablement	Jan 2024	Needs update
Pricing FAQs	BOFU	Sales	Feb 2024	High use in Q4

✅ Set review reminders every quarter (automate if possible)

📌 **Pro Tip:**

If content lives in 8 places, reps won't use it. A lean enablement engine isn't about *more* content—it's about **relevant, accessible, agile, and easy-to-send assets at the moment of need.**

SAAS DEMO CALL CHECKLIST

PRE-DEMO PREP (BEFORE THE CALL)

Have I done a dry run with my SE?
Have I reviewed discovery notes (pain, use case, outcome)?
Is the deck/demo flow tailored to their specific **role + pain points**?
Do I have 1–2 case stories aligned to their **industry or objection set**?
Is a decision-maker or influencer confirmed on the call?
Do I have a clear CTA for the end of the call?

DURING THE DEMO (LIVE FLOW)

Opening (2–4 minutes)
Confirm agenda, time availability, and outcomes

Discuss what their next steps will be if they like the demo

"Here's what I'll walk through, and I'll pause for reactions..."
Anchor back to the pain from discovery:
"You mentioned [problem]—I'll show how we address that directly."

Review and confirm their current state and desired future state

Main Demo (5–30 minutes)
Start with *the outcome*, not the feature
Tie every feature to a specific job, role, or friction
Use phrasing like:

"Here's what our best customers love…"
"This is where teams usually get stuck without this…"

Ask micro-checks:
"Does this align with what you were hoping to see?"
"Could you see your team using it this way?"

Engagement Cues to Watch For:
Camera/body language shifts
Question depth increases
Buyer is visualizing ("Could this connect with our [tool]?")

Closing (3–5 min)
Summarize:

"You came in with [X need], and we showed [Y result]—sound right?"
Clarify decision path:
"Who else needs to weigh in before we move forward?"

Clarify project timing:
"Is this s project for next year?"
Lock next step on calendar before ending
Ask for the paper process if they're interested

POST-DEMO FOLLOW-UP (WITHIN 24 HOURS)

Send summary with clear recap:

"Here's what stood out to you…"
Include targeted case study or ROI example
Confirm next step date and agenda
If no response in 2 days → send follow-up that reframes urgency

📌 **Pro Tips:**

Great demos are *controlled conversations*, not tours. The goal isn't to show the product. It's to highlight their pain, uncover more pains, and then ease those pains with your solution.

They know you understand your solution. Show them you understand them.

The AE is in control of the conversation. They will pick up on things that SEs won't notice. It is the AE's job to ensure the demo stays on track, and that the customer feels heard and understood.

OBJECTION HANDLING SCRIPTS

REFRAME RESISTANCE. REDUCE FRICTION. CLOSE THE GAP.

Audience: AEs, closers, sales coaches, founders handling deals directly

🧠 **What It's For:**

Most SaaS reps respond to objections reactively—or worse, defensively. This guide gives you pre-built reframes for the 6 most common deal-blocking objections, built on buyer psychology and behavioural cues.

THE 6 CORE SAAS OBJECTIONS + BEHAVIOURAL REFRAMES

Leverage the LAARC method:

Listen

Acknowledge

Assess

Respond

Confirm

1. "It's too expensive."

Default = pricing panic
Reframe = value anchoring + contrast

"Totally fair—this isn't a small investment.
Out of curiosity: compared to what?
Is it price, or timing that feels off?"

→ Follow-up framing:

“Our best customers often say it *felt expensive until they calculated* how much they were losing on [manual process / broken flow / delay]. Can I show you that math?”

✅ Why this works: Anchors value to **future pain avoided**, not current spend.

2. “We’re already using another tool.”

Default = battle the feature set
Reframe = wedge the upgrade insight

“Makes sense—most teams we work with weren’t switching from zero.
They were upgrading from a tool that didn’t scale the way their pipeline did.
Mind if I ask where that tool falls short today?”

✅ Why this works: It lowers defensiveness by affirming past decisions, then triggers dissatisfaction awareness.

3. “We’re not ready yet.”

Default = push harder
Reframe = future-self framing

“Totally. Curious—when you say ‘not ready,’ do you mean process, budget, or internal priorities?
Because if we *wait until it’s urgent*, it might be too late to drive a clean rollout.”

→ Bonus line:

“Your future self 90 days from now is either stuck in the same friction—or already shipped this. Which one are we building for?”

✅ Why this works: It anchors urgency to *opportunity cost*, not pressure.

4. “We need to think about it.”

Default = silence or generic follow-up
Reframe = decision friction unpack

“Absolutely—when folks say that, it’s usually one of three things:

1. They’re still unsure on impact,
2. Someone else needs a green light,
3. Timing isn’t locked in.

Which bucket are you in?”

✅ Why this works: You’re not challenging the delay—you’re decoding it *collaboratively*.

5. “Can you send me more info?”

Default = email it and lose the thread
Reframe = clarify the ask, re-engage intent

“Happy to. Just so I don’t send a PDF to die in your inbox—what would be most useful? Budget details, tech specs, or a case that matches your use case?”

→ Bonus follow-up:

“I’ll send it, and let’s lock in 10 minutes to walk it through—fair?”

✅ Why this works: You take control of the follow-up while respecting their signal.

6. “We went with another solution.”

Default = “Thanks anyway”
Reframe = value exit or bounce-back positioning

“Totally understand—may I ask what won the deal for them?
I’d love to know what stood out (and what didn’t).”

→ If they answer:

“Helpful to hear. In case anything shifts, we’re always here—and usually called back in when [other solution] doesn’t scale post-onboarding. Hopefully not the case, but worth keeping my name.”

✅ Why this works: You remain confident, signal endurance, and keep the door open.

📌 **Pro Tip:**
Run a live call workshop where your AEs roleplay 3 of these objections in front of peers. One person reads the default script, another uses the reframe. Debrief for tone, outcome, and language psychology.

Practice in low risk scenarios so you can excel in the high reward ones.

SALES ONBOARDING FRAMEWORK

RAMP NEW REPS 2X FASTER—WITH CLARITY, CONFIDENCE, AND QUOTA READINESS

Audience: Sales managers, enablement leads, RevOps, founders hiring AEs or SDRs

🧠 **What It's For:**
Most SaaS onboarding is reactive. "Here's Gong, here's Slack, go shadow this AE..."
This framework turns onboarding into a **measurable, modular, repeatable system**—so reps hit productivity faster, and managers stop guessing.

30-60-90 SAAS SALES ONBOARDING FRAMEWORK

PHASE 1: FIRST 30 DAYS — LEARN THE SYSTEM

Goal: Product understanding + process fluency

Milestones:

- ✅ Complete product demo walkthroughs (as prospect and presenter)
- ✅ Shadow 5 live SDR calls + 3 AE demos (recorded or live)
- ✅ Learn ICP, buying triggers, and core use cases
- ✅ Complete objection response certification
- ✅ Build first personalized outbound sequence

Manager Check-In Prompt:

“Can you articulate how our top 3 clients found us, why they chose us, and how we solved their pain?”

PHASE 2: DAY 31–60 — APPLY THE MOTION

🎯 Goal: Pipeline generation + live conversations

Milestones:

- ✅ Make first 50 outbound touches
- ✅ Book 5 meetings (SDRs) or run 3 full discovery calls (AEs)
- ✅ Submit call recordings for manager feedback
- ✅ Practice deal stage progression framework
- ✅ Deliver 15-minute roleplay: “Pitch me like I’m a prospect with zero context”

Manager Check-In Prompt:

“What’s the biggest friction point in your first live calls—and how are you handling it?”

PHASE 3: DAY 61–90 — OWN YOUR PIPELINE

🎯 Goal: Independent execution + early performance

Milestones:

- ✅ Own full outbound cadence or opp cycle
- ✅ Hit 80% of first quota or meeting target

- ✅ Submit deal forecast with rationale
- ✅ Deliver win/loss recap on first 3 deals
- ✅ Create 1-pager: “How I’ve adapted my talk track to fit [persona]”

Manager Check-In Prompt:

“Where do you feel 80% confident—and where are you still flying blind?”

WEEKLY MANAGER COACHING CHECKLIST

For 1:1s during ramp period:

◻ What’s one win we can reinforce?
◻ Where are they overthinking vs. under-preparing?
◻ What can we simplify?
◻ What needs clarification in the playbook?
◻ Are they shadowing top performers and debriefing?

📌 **Pro Tip:**

Make onboarding visible. Use a whiteboard, Notion tracker, or team dashboard. It should feel like a system, not a scavenger hunt.

SAAS DEAL ACCELERATION TOOLKIT

SPEED UP SALES CYCLES, KILL INDECISION, AND CLOSE HIGH-VELOCITY DEALS WITHOUT PRESSURE

Audience: AEs, sales leaders, founders, GTM teams at SaaS companies

🧠 **What It's For:**

Most SaaS deals don't lose to competitors—they lose to **no decision**. This toolkit helps your team break through stalls, accelerate buying timelines, and guide prospects toward close—*without pushiness*.

DEAL ACCELERATION TOOLKIT COMPONENTS

1. OBJECTION REFRAMES (USE IN LATE-STAGE DEALS)

Objection	Reframe
"Let's revisit next quarter."	"Totally fair—though quick heads up: teams who delay often face [cost/risk trigger]. Want to explore a soft start now to get ahead?"
"We're talking to other vendors."	"Great—happy to be part of that. Curious, what's the #1 thing you're hoping a partner does *better* than your current process?"
"We don't have budget locked yet."	"Understood—would a phased rollout or pilot help make this budget-neutral for Q1?"

✅ Goal: Reduce pressure, increase clarity & control

2. URGENCY ANCHORS (BUILD BUYER MOTIVATION WITHOUT HYPE)

- Cost of Delay

"If nothing changes by [X], what's the downside for your team/client/retention?"

- Backlog Consequences

"How long has this been a priority without a move—and what's at risk if it stays there?"

- Time to Value

“If we kicked off next week, you'd be live by [Month]. What does that unlock?”

- Peer Movement

“We’ve seen 3 teams in your space move on this in the last 60 days—want to see why?”

✅ Use in calls, emails, or pilot-close loops

3. ACCELERATION EMAIL TEMPLATES

🟢 Soft Push (After Verbal Interest)
Subject: Rolling next steps?

Hi [Name],

Sounds like you’re leaning toward [Solution]—just wanted to check if you’d like us to prep kickoff materials or loop in anyone else before close.

Happy to tailor based on your timeline.

— [AE Name]

🟡 Stall Reboot (Ghosted Prospect)
Subject: Still worth holding your spot?

Hi [Name],

We’re locking pilot timelines for [Month]—wanted to check in case [Solution] is still active on your end.

If now’s not the right time, just say the word.

(If helpful: [One-pager link / customer story])

🟡 Stall Reboot (Ghosted Prospect) #2
Subject: Feels like you've changed directions

Hi [Name],

It feels like you may have changed directions or priorities. I want to stay on the same page. Let me know if this is the case so I can realign my resources here.

Thanks,

(If helpful: [One-pager link / customer story])

🔴 Executive Loop-In

Subject: [First Name] mentioned this might be useful...

Hi [Exec Name],

I've been speaking with [Champion] about how you're approaching [X]. Thought I'd share a quick summary of where we can help—and offer a brief walk-through if useful.

(We've done this with [Peer Company / Result Example].)

Let me know if you'd like to see what that could look like for your team.

—

4. TOOLKIT BONUS: “DEAL HEAT SCORECARD”

Quick yes/no checklist to qualify urgency:

Clear buying timeline?
Economic buyer involved?
Budget owner looped in?
Problem quantified?
Stakeholder consensus likely?

✅ 4–5 yes = high heat
✅ 2–3 = coachable
✅ <2 = probably slipping

📌 **Pro Tip:**

You don’t “close” SaaS deals—you **guide** them. This toolkit makes you the most helpful, least ignorable voice in their inbox when things go quiet.

EMAIL OUTREACH SEQUENCE TEMPLATES

START SMARTER CONVERSATIONS WITH BUYERS—WITHOUT SOUNDING LIKE EVERY OTHER REP

Audience: SDRs, AEs, founders doing outbound, sales leaders

🧠 **What It's For:**

Most outbound gets ignored because it's templated to death. These sequences are built to trigger curiosity, establish credibility fast, and prime high-fit SaaS buyers for meaningful conversations.

SEQUENCE 1: TRIGGER-BASED OUTREACH (OUTBOUND TO INBOUND CONVERTERS)

Best for: leads showing activity (site visit, webinar, content download, etc.)

Day 1 — Subject: "Saw you exploring [X]..."

"Hi [First Name],

Noticed someone from your team was looking at [Page/Topic]. I'm not sure of this is a priority for you right now, but I thought I should reach out to ask.

We help SaaS teams like [Their Company] go from [Manual Process] → [Automated Outcome] with [Your Product].

Worth sharing how [Customer X] did it in 3 weeks?"

👉 CTA: "Open to a quick overview call this week?"

Day 3 — Follow-Up:

"Should I send the quick case study or just give you the TL;DR?"

SEQUENCE 2: COLD PERSONALIZATION SEQUENCE (MID-MARKET SAAS)

Best for: targeted outbound to ICP titles by industry

Day 1 — Subject: “Quick question re: [team/process] at [Company]”

“Hi [First Name],

[Role]s at B2B SaaS teams like [Their Company] come to us when they want to [solve the problem]. e’re seeing a pattern:

Teams are booking meetings, but conversion from demo → proposal is soft.

Usually it’s a positioning gap, or reps are jumping to features too early.

Want to see what we did with [Similar Client] to shift that?”
👉 CTA: “Open to chat?”

Day 4 — Follow-Up:

“Still relevant? If not now, no worries—timing’s everything. Can I circle back with you to see if this is top of mind in a couple of quarters?”

SEQUENCE 3: PAIN PLAY OUTREACH (FOUNDER-LED OR CHALLENGER POSITIONING)

Best for: high-impact, short-cycle, product-led SaaS motions

Day 1 — Subject: "Your reps probably aren't the problem"

"Hi [First Name],

Most teams think slow sales = low effort.
But in 9/10 cases, it's a process leak—usually in the SDR/AE handoff or in how objections are framed.

We just helped [Client] go from 17% → 38% close rate in 60 days by fixing the system.

Want a look?"
👉 CTA: "Happy to share the before/after."

Day 3 — Follow-Up:

Looks like this isn't top of mind for you right now, but things change. Can I circle back in a couple of quarters?

MESSAGING PRINCIPLES BAKED IN:

- Lead with insight, not intros
- Keep subject lines casual but curiosity-driven
- Trigger emotion, then offer proof
- Always offer value *before* time

📌 **Pro Tip from:**

Customize the CTA for your tone—“open to feedback,” “want the teardown,” or “want to trade notes” works better than “book a demo.”

WHAT'S NEXT?

If you found this toolkit valuable, here are three ways to go further:

1. Book a Strategy Call:

Let's map these frameworks directly to your current challenge.
Book Your Call Here

2. Download Another Toolkit:

Explore toolkits for sales, leadership, persuasion, and negotiation.
🌐 See our Tool Kit Library HERE

3. Subscribe to the Drip Series:

Get deeper behavioural strategies, templates, and case studies—delivered in 5-minute reads.
👉 The opt-in is at the bottom of THIS PAGE

Questions? Feedback?
Reach out directly: Tom Reilly
📧 tom@reillysalesconsulting.com
🌐 reillysalesconsulting.com | limbinic.com

Reilly Sales Consulting (RSC)
"Where closing psychology meets bulletproof sales systems."

Reilly Sales Consulting helps B2B sales teams close faster, with less friction, and greater predictability.
We install frameworks rooted in behavioural science that unlock complex buying groups, surface hidden objections early, and engineer decision-making confidence — without the pressure tactics that buyers resist.
Whether you're scaling SaaS, professional services, industrial manufacturing, or founder-led growth, RSC gives your team the psychology-driven edge to win faster, bigger, and more often.

Limbinic Consulting
"The Science of Influence for High-Stakes Professionals."

Limbinic empowers leaders in law, consulting, financial services, and other high-stakes industries to master the art and science of influence.
Our frameworks combine cognitive science, courtroom persuasion tactics, and elite-level strategic communication to help you shape outcomes where stakes — and scrutiny — are highest.
From closing multi-million-dollar contracts to winning high-risk negotiations, Limbinic gives you the tools to influence like a superpower.