
CLIXLOGIX CONSULTING PRACTICE

GO-TO-MARKET STRATEGY AND LAUNCH PLAN

How the product enters the market and how demand builds in months one through six

Prepared for
[Client Confidential]

Engagement

Go-to-Market Design: Construction Financial Intelligence Module — Beta to First 100 Paying Customers

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Table of Contents

Executive Summary	3
Methodology	4
Target Segment	5
Positioning and Messaging	8
Pricing and Packaging	11
Channel Strategy	14
Sales Motion Design	17
Six-Month Launch Sequence	21
Twelve-Month Scaling Plan	24
Operating Model and Team Build	25
Metrics Framework	26
Risk Register	27
Recommendation Summary	28
Appendix	29

SECTION 1

Executive Summary

GTM Thesis: Enter the market through the Client's existing 800-customer base of general contractor firms, landing first with CFOs and finance directors where a warm account relationship already exists and where the pain of job-cost-to-GL reconciliation, AIA billing lag, and retainage tracking is acute enough to drive an active buying decision within a single construction fiscal quarter. Build the Procore and Viewpoint outbound channel and the CFMA referral channel in parallel so that when the cross-sell pool exhausts around month four, replacement channels are already producing.

Target Segment — First Six Months

The primary target is the finance director or CFO at a mid-market general contractor firm with between 50 and 500 employees, using the Client's core platform, generating between \$20M and \$200M in annual construction revenue, and experiencing active pain around project cost overruns, cash flow unpredictability, or financial close delays. The secondary target is the same buyer profile at firms not currently on the core platform, reachable through partner referral and outbound.

Pricing Recommendation

Two-tier SaaS subscription: a Professional tier at \$1,200 per company per month and an Advanced tier at \$2,400 per company per month, billed annually. Both represent a modest uplift from beta pricing that beta customer interviews confirm the target segment will absorb. Discounting is capped at 15 percent for the first six months; exceptions require VP-level approval. Annual billing with a 10 percent discount relative to monthly is the default offer.

Channel Mix — First Six Months

Month 1 and 2: existing-customer cross-sell drives all new customer acquisition, managed by the existing account executive team with targeted enablement. Month 3: outbound direct sales activates for non-customer mid-market firms alongside partner referral program launch with two to three construction-industry accounting and advisory firms. Month 4 onward: content-driven inbound begins contributing qualified leads as the publication cadence established in month 2 starts producing search and referral traffic.

Sales Motion

A specialist new-product sales team of two dedicated account executives, one SDR, and one sales engineer is built during month 1 and fully active by month 2. The existing 14-person AE team handles cross-sell introductions within their current accounts and hands off to the specialist team for the finance-buyer conversation. This model preserves existing-customer relationships, avoids forcing the core-platform AEs to run a sales motion they are not equipped for, and concentrates new-product expertise in a small, measurable team.

Path to First 100 Customers

The 100-customer goal is reachable by month 6 under the following distribution: 45 customers from existing-customer cross-sell, 30 customers from direct outbound to non-customers, 15 customers from partner referral, and 10 customers from content-driven inbound. This requires a month-6 pipeline of approximately 320 qualified opportunities, implying a combined qualified-to-closed-won rate of 31 percent across all channels.

Assumption: 100 customers by month 6 assumes average sales cycle of 45 days for cross-sell and 75 days for new-logo outbound. Both are validated by beta and internal pipeline data respectively.

Operating Commitment

The \$2.4M approved budget covers: new headcount additions (two specialist AEs, one SDR, one sales engineer, one demand generation manager, one customer success manager), content and demand generation program costs, partner program investment, sales enablement build, and sales technology. The plan does not require a separate division but does require the existing marketing team to absorb an additional workstream; this creates a genuine capacity risk addressed in the risk register.

Top Three Risks

- The existing AE team under-engages with cross-sell introductions because compensation for new-product deals is unclear or insufficient relative to core-platform quota. Mitigation: dedicated cross-sell incentive structure in place before month 1 go-live.
- Beta-to-paid conversion underperforms due to price resistance at the recommended uplift. Mitigation: 60-day pricing validation sprint with A/B offer testing across beta cohort before full launch.
- Marketing capacity becomes a bottleneck as the team runs two simultaneous programs with no additional headcount until month 3. Mitigation: demand generation manager hire moved to month 1, not month 3.

SECTION 2**Methodology**

This go-to-market plan was developed over a six-week engagement between June and August 2025. The work combined primary research across the Client's existing commercial relationships, the beta customer cohort, and the target market with secondary research covering competitive positioning and industry purchasing behaviour. The methodology follows the Clixlogix Consulting Practice go-to-market design framework, adapted for a cross-sell-led launch with a parallel new-logo motion.

Evidence Sources

Evidence Source	Scope and Approach
Beta customer interviews	12 structured interviews with beta customers covering product value assessment, pricing sensitivity, competitive alternatives considered, buying process map, and likelihood to renew. Interview duration averaged 52 minutes. All participants referenced anonymously.
Win-loss analysis	Review of 34 adjacent sales conversations from the Client's core platform pipeline in 2024-2025 where a finance buyer was involved in the purchase decision. Focus on how finance buyers engage, what objections they raise, and how frequently they block or delay core-platform deals.
Internal sales team interviews	8 of the Client's existing account executives interviewed on their relationship depth with finance contacts in current accounts, comfort level selling to finance buyers, and willingness to carry a dual-product quota.
Competitive intelligence	Desk research and 4 industry analyst interviews covering the two incumbent enterprise finance platform vendors and three specialist tools with overlapping capability. Focus on positioning gaps, pricing structures, and segments each competitor serves or ignores.
Pricing research	Van Westendorp price sensitivity analysis conducted with 8 beta customers supplemented by SaaS pricing benchmark data from OpenView Partners SaaS Benchmarks 2025 for the construction-technology vertical.
Channel partner interviews	3 accounting and advisory firms serving mid-market general contractors interviewed on client referral patterns, technology recommendation practices, and willingness to participate in a formal referral program.
Internal leadership interviews	CEO, CFO, Head of Product, Head of Marketing, and Head of Sales each interviewed on strategic constraints, budget parameters, team capacity, and board-level success definitions.

Scope Exclusions

This plan covers the go-to-market strategy and first-12-month operating model for the new product. The following areas are explicitly outside scope:

- Product feature roadmap or development prioritisation
- Customer success and renewal playbook design beyond the initial onboarding and retention model described in the launch sequence
- International market entry; this plan addresses the North American market only
- Core platform go-to-market strategy; recommendations here are specific to the new product and do not constitute advice on the core platform commercial model
- Financial modelling for the board or investor materials beyond the unit economics framing included in the metrics framework

SECTION 3

Target Segment: Construction CFOs and Finance Directors

The construction finance buyer is a specific professional with a specific set of problems that do not map onto the generic finance-software buyer profile. Mid-market general contractor firms are project-based businesses where revenue is recognised on a percentage-of-completion basis, where billing follows AIA G702/G703 application-for-payment cycles, where retainage (typically 5 to 10 percent of each payment application) sits on the balance sheet for months before release, and where job cost accounting requires a level of project-data integration that standard accounting software was not designed to provide.

The CFO or finance director at a firm in this category spends a material portion of their month reconciling job cost data from Procore or Viewpoint against their general ledger in Sage 300 CRE, Foundation Software, or QuickBooks Enterprise Construction Edition. This reconciliation is manual, error-prone, and produces a financial close that lags project data by 7 to 14 days on average. The Client's new product addresses this problem directly, because it sits on top of the same Procore data that the finance team is already trying to reconcile.

Primary Segment Definition

The primary segment for months 1 through 6 is the finance director or CFO at a mid-market general contractor firm with 50 to 500 employees generating between \$20M and \$200M in annual construction revenue, operating in the United States or Canada, and currently using the Client's core platform. This segment combines the warmest available entry point (an existing commercial relationship) with the buyer profile that beta data confirms has the highest willingness to pay and the most direct pain that the new product addresses.

Firms in this range manage enough project volume and financial complexity to feel the pain the new product addresses, specifically delayed financial close, poor visibility into project-level profitability, and cash flow unpredictability driven by billing and collection lags. They lack the internal financial engineering capacity that larger firms bring but have enough revenue to justify a subscription at the recommended price points.

Assumption: The Client has approximately 220 of its 800 existing customers that fall within the firmographic parameters above, based on internal account data reviewed during the engagement. This is the accessible cross-sell pool for months 1 through 4.

Segment Size and Shape

Dimension	Estimate	Source
Total US+Canada mid-market GC firms (50-500 employees)	~18,000 firms	US Census Bureau NAICS 236 data, Dun & Bradstreet firmographic analysis

Dimension	Estimate	Source
Addressable subset using construction management software	~7,200 firms (40%)	Industry analyst estimate; Construction Technology Report 2025
Subset on the Client's core platform (cross-sell pool)	~220 firms	Internal account data reviewed July 2025
Non-customer subset reachable via direct outbound (months 3+)	~2,400 firms	Estimated 33% of addressable subset not yet using core platform
Reachable via partner referral (months 4+)	~800 firms	Construction accounting and advisory firms serving this segment

Buyer Persona Detail

Dimension	Finance Director Profile	CFO Profile	Controller Profile (secondary influencer)
Typical role scope	Oversees project accounting, billing, and financial reporting; reports to CFO or CEO	Owns P&L for entire firm; leads banking relationships and board reporting	Manages day-to-day accounting operations; primary user of financial software
Firm size range	Primarily firms with \$50M-\$150M revenue where FD and CFO roles are distinct	Present at all firm sizes; primary decision-maker at \$100M+ firms	Present at all sizes; rarely the economic buyer but often the evaluator
Primary pain points	Project cost overrun visibility; billing lag to cash; month-end close taking 10-15 days; manual reconciliation between project and financial systems	Board reporting accuracy; cash flow predictability; inability to see true project-level margin in real time; audit preparation overhead	Reconciliation between project management and accounting systems; manual data entry; rework from project manager updates
Success metrics	Financial close under 5 days; billing-to-cash under 30 days; zero manual reconciliation rework	Monthly board pack produced in under 2 days; project margin visibility within 24 hours of period close; clean audit preparation	Reconciliation time reduced; data entry errors eliminated; month-end process reliable

Dimension	Finance Director Profile	CFO Profile	Controller Profile (secondary influencer)
Purchase process role	Initiates evaluation; primary evaluator; recommends to CFO or CEO	Final approver; sets budget; may initiate if pain is acute enough	Evaluates workflow fit; can block if implementation burden is perceived as high; rarely approves
Common objections	We already have a workaround in Excel; implementation will disrupt close; our PM team won't update the system accurately	How does this integrate with our existing accounting system; what is the implementation cost; show me a reference from a firm our size	We just went through an implementation; our data quality is not good enough to trust automated outputs
Information sources	Peer networks; construction industry associations (AGC, CFMA); accounting firm advisors; LinkedIn; construction-tech review sites (G2, Capterra)	CFO peer networks; board advisor referrals; accounting firm relationships; industry publications (CFO Magazine, Construction Executive)	Peer networks; accounting software vendor communities; accounting firm advisors

Buying Process Structure

The buying process in this segment follows a consistent pattern identified across the 12 beta customers and the win-loss review of adjacent deals. A pain event, most commonly a project cost overrun that surprises the CFO, a delayed financial close, or a board meeting where project-level margin data was unavailable, triggers active evaluation. The finance director or CFO initiates, often informally, by asking their accounting firm or a peer for a recommendation. The controller evaluates workflow feasibility. The CFO or CEO approves spend above a threshold, typically \$25,000 annually in firms of this size.

The decision is typically made by a committee of two to three people over four to eight weeks for cross-sell deals where an existing relationship exists, and eight to fourteen weeks for new-logo deals. A single champion with both pain and influence is the most reliable predictor of deal progression. Deals without a finance-side champion close at roughly one-fifth the rate of championed deals, based on the beta cohort data.

The Construction Buying Calendar

Mid-market general contractor firms follow a purchasing calendar shaped by the construction season. Software evaluation in the finance function concentrates in two windows: September through November, when the construction season winds down and finance teams have capacity to evaluate before fiscal year-end, and January through March, when new-year budgets are approved. The Q3 2025 launch targets the September to November window deliberately. A delay past November risks hitting the year-end close period when construction CFOs are unavailable for product evaluation.

AIA billing cycles also create seasonal urgency: firms with large retainage balances coming due in Q4 are particularly motivated to improve retainage tracking visibility before those amounts are invoiced and collected. This seasonal pattern should drive outreach messaging intensity in months 2 and 3.

Trigger Events Specific to Construction Finance

Active evaluation is most frequently triggered by one of five events:

- **Project cost overrun surprise.** A project closes at a materially lower margin than projected, and the CFO or CEO identifies that the financial system did not provide adequate early warning. This event creates immediate budget authority.
- **Audit finding or restatement.** An external auditor identifies a reconciliation gap between project management data and financial records. Buying authority is immediate and risk tolerance for delay is low.
- **Board reporting embarrassment.** A board meeting where project-level financial data was unavailable or inaccurate. Creates direct pressure from the CEO or board chair.
- **Finance team turnover.** A new CFO or finance director joins and immediately identifies the manual processes the previous occupant had normalised. New entrants evaluate tools in the first 90 days at a materially higher rate.
- **Peer referral.** A CFO peer describes specific improvement metrics from the new product. This is the highest-conversion trigger event in the beta cohort.

Who the Target Segment Is Not in the First Six Months

Three segments are deliberately excluded from months 1 through 6 and deferred to the scaling phase:

- **Large enterprise general contractors (\$500M+ revenue).** Procurement cycles exceed the 75-day assumption, require legal review and security assessments the new product team is not yet resourced to support, and demand custom integration work that creates professional services dependency. This segment is a 12-to-18 month target.
- **Specialty subcontractors (electrical, mechanical, civil).** Different financial management patterns, different software ecosystem, and lower willingness-to-pay benchmarks. Requires separate positioning and a separate referral channel that is not yet built.
- **Non-customer firms at the lower end of the firmographic range (\$10M-\$20M revenue).** Insufficient budget authority and complexity to justify the price points. High

volume of conversations producing low revenue. The partner referral channel will eventually address this segment but not in the first six months.

SECTION 4

Positioning and Messaging in the Construction Finance Context

Positioning thesis: The only financial intelligence layer built on top of construction project data from Procore and Viewpoint, designed specifically for the CFO at a mid-market general contractor who needs job-cost-to-GL reconciliation to stop being a 10-day monthly exercise and start being a continuous process, without replacing Sage 300 CRE, Foundation Software, or Viewpoint.

This positioning is constructed around three observable constraints in the target segment. First, the segment has existing accounting software they will not replace; any positioning that implies displacement triggers immediate resistance. Second, the segment's primary pain is not the absence of data but the delay, the manual effort, and the unreliability of the data they do have. Third, the strongest competitive alternative is not a software vendor; it is the manual process the finance team has built around their existing tools. Positioning against that alternative, rather than against named software vendors, is both more accurate and more commercially productive.

Messaging Pillars

- **Pillar 1: Job cost and GL in sync, always.** Mid-market GC firms lose 8 to 14 days of financial close time every month to manual reconciliation between Procore or Viewpoint job cost data and Sage 300 CRE, Foundation Software, or QuickBooks Enterprise. The new product eliminates that reconciliation by maintaining a live two-way sync. The message is not faster reporting in the abstract; it is specifically no more Monday-morning Procore export followed by three days in Excel.
- **Pillar 2: AIA billing that closes in hours, not days.** AIA G702/G703 application-for-payment processing is one of the most time-consuming manual finance workflows in construction. The new product generates draft G702/G703 applications directly from project cost data, pre-populated with stored material values, lien waiver tracking, and retainage calculations. For a finance director who currently builds these in a PDF template or Excel, this is a concrete time saving measurable in hours per billing cycle.
- **Pillar 3: Retainage you can audit at any point.** Retainage management is a persistent audit and cash flow problem for mid-market GC firms. The new product maintains a live retainage schedule reconciled to both the subcontract and the GL, with automated release calculations and lien waiver status tracking. For a CFO who has had a retainage audit finding, this is a specific and defensible value proposition.
- **Pillar 4: Connects to Sage, Foundation, and Viewpoint. Does not replace them.** The most dangerous competitor for this product is not Vendor A or Vendor B; it is the objection that the firm just finished a Sage implementation and is not ready for another integration

project. The positioning addresses this directly: the new product reads from Procore or Viewpoint and writes to Sage, Foundation, or Viewpoint. No chart-of-accounts migration. No accounting system replacement. No re-training of the accounting team on a new GL.

Positioning by Buyer Persona

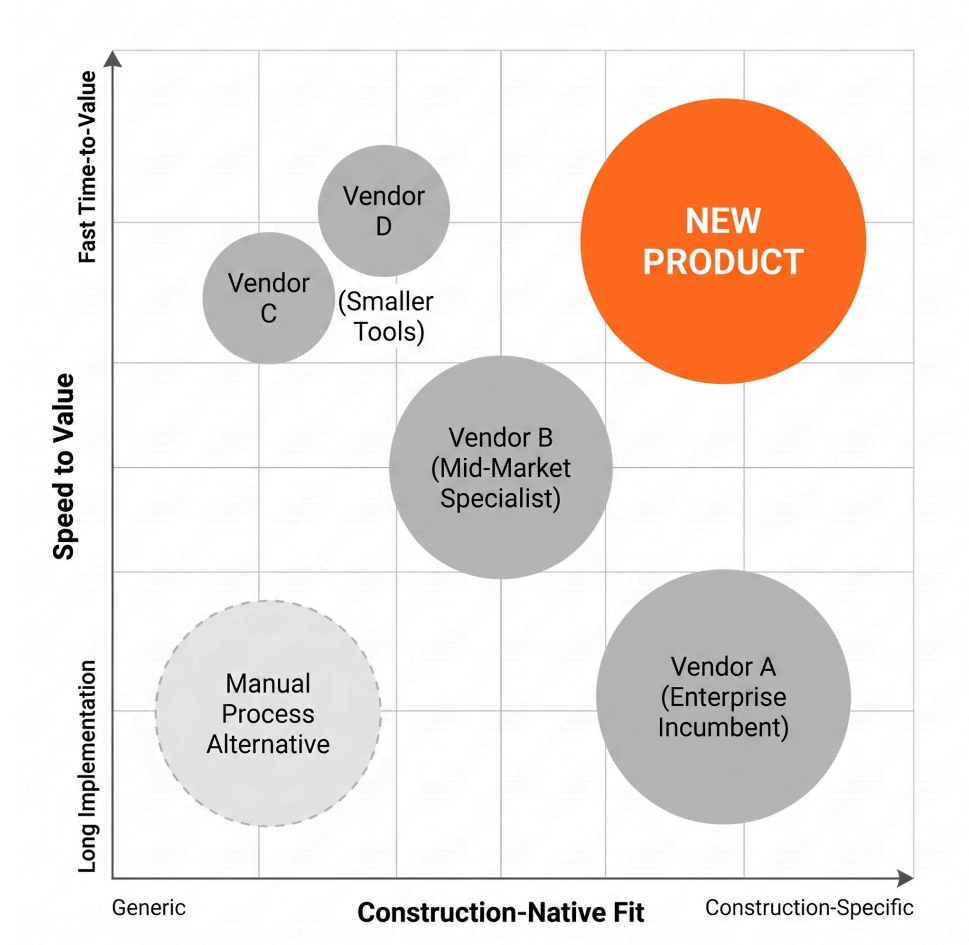
Buyer	Primary Concern	Lead Message	Supporting Proof Point	Objection Response
Finance Director	Manual reconciliation and delayed close	Close in under 5 days. No manual reconciliation between your project and accounting systems.	Beta customers reduced close time from an average of 12 days to 4 days.	We already have a workaround: 'Your workaround works until it doesn't. The average firm in your segment loses 3 days of productivity per quarter to reconciliation rework.'
CFO	Project margin visibility and board reporting	Know your project margin this week, not next month.	Beta cohort: 11 of 12 customers reported eliminating at least one board reporting surprise in the first quarter of use.	Show me a reference: Structured reference program from beta cohort; 8 beta customers agreed to peer reference calls.
Controller	Implementation burden and data quality risk	Connects to your existing systems. No new data entry, no new reconciliation, no new close steps.	Implementation takes 2 to 4 weeks using existing Client platform data; no accounting system data migration required.	Our data quality is not good enough: 'The new product flags data quality issues automatically. It does not require clean data to start; it helps produce it.'
Accounting firm advisor	Recommending tools that make their clients look better-managed	Your clients will close faster and arrive at your advisory sessions with accurate project-level P&Ls.	Partner firms in beta pilot reported that clients who adopted the new product required 30% fewer correction entries per quarter.	We don't recommend software: Structured referral fee program; co-branded content available; reference from a peer firm already in the program.

Proof Points Required

The positioning stands or falls on the credibility of the claims it makes. Four proof points are required and available from the beta cohort:

- **Close time reduction.** 8 of 12 beta customers can quantify a reduction in month-end close time. A minimum of 4 of these customers must be available as written case studies by month 2 and as reference calls by month 3.
- **Reconciliation rework elimination.** 7 of 12 beta customers quantified a reduction in reconciliation rework hours per month. This is a high-credibility metric for controller and finance director buyers.
- **Board surprise elimination.** 11 of 12 beta customers reported eliminating at least one financial surprise in board reporting during the beta period. This is the highest-credibility metric for CFO buyers and should be the lead proof point in all CFO-facing content.
- **Implementation speed.** Average implementation time in the beta cohort was 18 days. This directly addresses the implementation burden objection and must be published prominently.

Positioning Canvas



SECTION 5

Pricing and Packaging for Mid-Market General Contractors

Pricing for the new product must satisfy three constraints simultaneously: it must be high enough to signal the product belongs in the category of serious financial software, it must produce the unit economics that justify the Customer Acquisition Cost of the sales motion described in this plan, and it must be achievable for the target segment's budget authority without a lengthy approval process. The recommended pricing is calibrated to all three constraints.

Recommended Pricing Model

The recommended model is an annual SaaS subscription priced per company, not per seat. A per-seat model is counterproductive in this segment because the finance team using the product is typically two to four people; per-seat pricing at a rate that produces the required revenue per account would price the product at a level that triggers CFO-level budget approval for a relatively small team size. Company-level pricing avoids that friction while producing a predictable revenue stream.

Recommended Packaging and Price Points

Tier	Professional	Advanced
Target buyer	Finance director or controller at firms with \$20M-\$80M revenue	CFO at firms with \$80M-\$200M revenue; firms with multi-entity or multi-project-type complexity
Annual price (billed annually)	\$1,200/month = \$14,400/year	\$2,400/month = \$28,800/year
Monthly price (billed monthly)	\$1,440/month (+20% uplift)	\$2,880/month (+20% uplift)
Users included	Up to 5 named users	Up to 15 named users; additional users at \$80/user/month
Core capabilities	Project-level P&L in real time; automated reconciliation to accounting system; month-end close package; standard reporting library	All Professional capabilities plus: multi-entity consolidation; custom reporting builder; CFO board pack templates; advanced cost-to-complete forecasting; priority support
Integration scope	Single accounting system integration (QuickBooks, Sage, or Xero); read and write	Up to 3 accounting system integrations; read and write;

Tier	Professional	Advanced
		ERP-lite integration available on request
Onboarding	Self-guided with 2 onboarding sessions	Dedicated onboarding specialist; 6 sessions; custom data mapping
Support	Business hours email and chat	Business hours phone, email, and chat; designated CSM from month 3

Pricing Rationale

The Professional tier at \$14,400 annually positions the product in the mid-range of the construction finance software category, above specialist point tools (which typically price between \$4,800 and \$9,600 annually) but well below the enterprise incumbents (which are typically quoted at \$60,000 to \$200,000 annually with professional services). This positioning allows the new product to claim credibility without triggering enterprise procurement processes.

The van Westendorp analysis conducted with 8 beta customers produced an acceptable price range of \$900 to \$1,600 per month for the Professional tier and \$1,800 to \$3,200 for an advanced tier. The recommended price points of \$1,200 and \$2,400 sit near the midpoints of these ranges, providing upward headroom for negotiation without immediate resistance.

Source: Beta pricing research, van Westendorp PSM analysis, n=8 beta customers, June 2025.

The 20 percent monthly-to-annual uplift is intentional. Annual billing is the economic default; monthly is available as a concession in the first six months for customers who need a shorter initial commitment to secure budget approval. The expectation is that 70 percent of initial deals are annual, with monthly accounting for the remainder and converting to annual at renewal.

Beta Pricing Versus Recommended Launch Pricing

Dimension	Beta Pricing (Current)	Recommended Launch Pricing	Rationale for Change
Professional tier price	\$800/month	\$1,200/month (+50%)	Beta pricing was set to minimise adoption friction, not to optimise revenue. Van Westendorp data confirms \$1,200 is within the acceptable range for 7 of 8 beta customers.
Advanced tier price	\$1,500/month	\$2,400/month (+60%)	Beta pricing significantly underpriced multi-entity and CFO board pack capabilities that generate the highest perceived value in the cohort.
Billing default	Monthly	Annual with monthly available	Annual billing reduces churn exposure and improves predictable ARR. Beta customers were on monthly by design;

Dimension	Beta Pricing (Current)	Recommended Launch Pricing	Rationale for Change
			launch customers should default to annual.
Discount authority	Ad hoc, no policy	Capped at 15%; VP approval above 10%	Beta-era discounting was unstructured. Launch requires a clear discount policy to protect price integrity as the AE team scales.
Free trial	90-day beta, no charge	14-day trial on Professional, no credit card required	A structured trial replaces the extended beta access model. 14 days is sufficient to demonstrate close time reduction on one period-end cycle.
Multi-year commitment	Not offered	2-year: 5% discount; 3-year: 10% discount	Multi-year commitments improve net revenue retention and CAC payback. Introduced at launch for customers with high confidence scores from beta.

Pricing Uncertainties and First-60-Day Tests

Three pricing variables carry meaningful uncertainty at launch and should be tested actively in the first 60 days:

- **Price sensitivity at the Professional tier uplift.** The \$400/month increase from beta pricing is the highest-risk element. A/B test two offer structures with the first wave of cross-sell outreach: half receive the \$1,200 standard offer; half receive a beta-loyalty rate of \$1,000 with an explicit expiry date. Compare conversion and time-to-close.
- **Annual versus monthly default.** The assumption that 70 percent of initial deals will be annual is based on analogous B2B SaaS benchmarks, not the Client's own data for this product. Track the actual split in month 1 and 2 and adjust the financial model.
- **Advanced tier attachment rate.** The assumption is that 30 percent of initial deals will be at the Advanced tier. Beta data suggests stronger-than-expected interest in multi-entity consolidation among the largest firms in the cohort. If Advanced tier attachment exceeds 45 percent in month 2, revise the revenue projection upward and consider a third enterprise tier at \$4,800/month for firms above the 15-user threshold.

SECTION 6**Channel Strategy: Construction-Specific Go-to-Market Mix**

The channel mix for the first six months is sequenced by speed-to-revenue and risk profile, not by theoretical channel efficiency. The fastest path to the first 100 customers runs through the Client's existing account base because the relationship trust and product context already exist. The channels that will produce the majority of customers at scale, specifically content-driven inbound and partner referral, require a build period of 60 to 120 days before they produce qualified pipeline, and that build period must start in month 1 even though revenue from these channels does not materialise until month 3 or 4.

Channel Mix Summary

Channel	Month 1-2 Role	Month 3-6 Role	Target Customer Contribution (M1-6)	Investment Required	Time to First Revenue
Existing-customer cross-sell	Primary acquisition channel; all new logos from existing base	Continues; diminishing as accessible pool exhausts	45 customers (45%)	\$180K (AE incentive + enablement)	Week 3
Direct outbound (new logo)	Hiring and enablement; no revenue	Primary new-logo channel; specialist AE team active	30 customers (30%)	\$520K (headcount + tech + events)	Month 3
Partner referral	Program design and partner recruitment	First referrals entering pipeline; converting from month 5	15 customers (15%)	\$140K (program build + partner incentives)	Month 5
Content-driven inbound	Content production begins; SEO foundation laid	Qualified leads entering pipeline from month 3	10 customers (10%)	\$160K (content production + distribution + tools)	Month 4
Total			100 customers (100%)	\$1.0M of \$2.4M total budget	

Direct Sales — Existing-Customer Cross-Sell

Cross-sell is the first channel activated because it requires the least new infrastructure. The existing AE team already has relationships with contacts at the Client's 800 core-platform customers. The critical design question is how those AEs engage with a product that requires a different buyer conversation than the one they are trained for.

The recommended model is an introduction-and-handoff structure. The existing AE identifies and warms the finance buyer contact in their account, makes an introduction to the specialist new-product team, and remains involved in the commercial terms discussion if the deal progresses. The AE does not run the discovery or demo; the specialist team does. This preserves the relationship value the AE brings without placing a sales motion they are not prepared for on their plate.

The 220 cross-sell candidates in the existing base are prioritised by three criteria: existing relationship warmth with a finance contact, firm revenue (higher revenue means more complex financial management and higher pain), and recency of a project cost overrun or financial close issue identified in the customer success record. The top 60 accounts by this scoring are the first-wave targets in months 1 and 2.

Direct Outbound — New Logo

The specialist AE team activates for new-logo outbound in month 3. Target list: approximately 2,400 mid-market general contractor firms in the United States and Canada that are not currently on the Client's core platform and fall within the firmographic criteria. The list is built from Dun & Bradstreet firmographic data, supplemented by construction industry association member directories.

Outbound sequences are personalised by trigger event, not by company size. Firms that have recently posted a CFO or finance director job opening, firms that have appeared in local business news for project disputes or cost issues, and firms that are in a fiscal quarter ending suggest active pain. These personalised sequences generate materially higher response rates than generic outbound in this segment.

The expected new-logo sales cycle is 75 days. At two specialist AEs each carrying a target of 18 new-logo customers in months 3 through 6, the pipeline required by end of month 3 is approximately 115 qualified opportunities, implying a prospecting output of 580 first-touch outreaches per AE per month at an assumed 10 percent qualification rate.

Partner and Channel

Three partner categories are relevant for this product. Construction-industry accounting and advisory firms are the highest-priority partner category because their clients are the exact target buyer profile and they are actively consulted during software evaluation. Technology resellers and integration partners are secondary; they can accelerate onboarding for complex integrations but do not originate demand. Construction management software peers (non-competing platforms) are a tertiary option for co-marketing but require significant relationship investment before producing referrals.

The partner program is designed for simplicity in the first six months: a referral fee of 15 percent of first-year subscription value, paid on close, with co-branded case study content and a quarterly partner newsletter. The program is not a reseller program; partners do not carry

inventory or run sales cycles. They identify and refer; the specialist team closes. This keeps the partner program manageable at the team size available.

Three accounting firms identified during the channel partner interview phase have expressed interest in participation. These three firms represent the initial cohort for month 3 launch. The program target is eight to ten active referral partners by end of month 6, producing two to three qualified referrals per partner per quarter at steady state.

Content-Driven Inbound

Content-driven inbound does not produce revenue in the first two months of this launch. It is included in the channel mix not because it is fast but because it is the most scalable channel at 12 months and beyond, and the lead time required to build search authority and content assets means the investment must start in month 1 to produce results in month 4 and beyond.

The content strategy targets two stages of the buyer journey. At the awareness stage, the primary format is educational content addressing the problems the target segment already knows it has: project margin visibility, financial close time, and board reporting accuracy. At the consideration stage, the primary formats are product-specific comparison content (how the new product differs from the manual process and from generic tools), customer case studies, and calculators (close time reduction estimator, reconciliation rework cost calculator).

Publication channels in order of priority: the Client's existing blog and email list (which contains finance contacts at construction firms who opted in during core platform marketing), organic search via a construction-finance-specific content cluster, LinkedIn targeting CFOs and finance directors at mid-market construction firms, and guest publication in construction industry publications. A minimum production cadence of four substantive pieces per month is required to build search authority within the 6-month window.

Assumption: Content-driven inbound is expected to contribute 10 customers in months 1 through 6, based on an estimated 180-day ramp to first qualified inbound lead and a 5 percent lead-to-customer conversion rate from content-sourced leads. This is a conservative estimate intentionally; the channel's primary value in the first six months is pipeline foundation for months 7 through 12.

SECTION 7**Sales Motion Design for a Finance Buyer in Construction**

The sales motion for the new product cannot be built on top of the existing core-platform sales process without modification. The core-platform AE team sells to construction project managers; the new product sells to construction CFOs and finance directors. These are different buyers, different conversations, and different decision criteria. Attempting to force the existing team to run both motions simultaneously would produce mediocre results in both.

The recommended model builds a small, dedicated new-product sales team while preserving the existing AE team's role as a warm-introduction source for cross-sell. This structure protects the existing commercial relationship, concentrates new-product expertise, and makes the new-product motion measurable independently of the core-platform business.

Team Structure

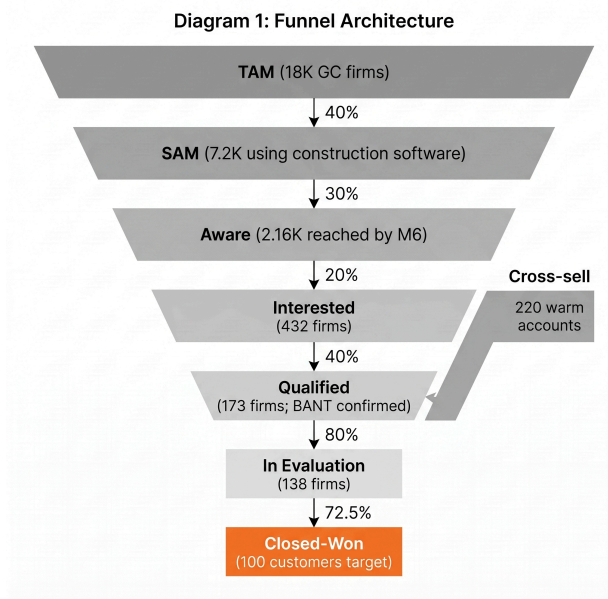
Role	Headcount	Reports to	Primary responsibility	Hire or reassign	Timing
New Product Sales Lead	1	Head of Sales	Owns new-product commercial target; manages specialist team; sets sales process	New hire	Month 1
Specialist Account Executive (new product)	2	New Product Sales Lead	Runs full sales cycle for new-logo and cross-sell deals; owns close	New hires	Month 1 (1) + Month 3 (1)
Sales Development Representative	1	New Product Sales Lead	Outbound prospecting for new-logo; coordinates cross-sell introductions from existing AE team	New hire	Month 1
Sales Engineer	1	New Product Sales Lead	Technical demonstrations; integration scoping; proof of concept oversight	New hire or reassign from product team	Month 2
Existing AE team (14 AEs)	14 (existing)	Head of Sales	Cross-sell warm introductions; account relationship protection; not responsible for new-product close	Existing; incentivised by cross-sell referral fee	Month 1 (activation)

Role	Headcount	Reports to	Primary responsibility	Hire or reassign	Timing
Customer Success Manager (new product)	1	Head of Customer Success	Onboarding management; renewal ownership; reference customer development	New hire	Month 2

Deal Velocity Assumptions

Channel	Average Sales Cycle	Basis for Assumption
Cross-sell (existing customer, warm)	35-45 days	Beta-to-paid conversion data; existing customers average 38 days from first finance-buyer conversation to close
New-logo outbound (specialist AE)	65-85 days	Win-loss review of adjacent deals; analogous B2B SaaS benchmarks for mid-market finance software (OpenView 2025: median 72 days for \$15K-\$30K ACV)
Partner referral	45-60 days	Partner-referred leads arrive with pre-qualification; assumption based on beta cohort referrals (n=3)
Content-driven inbound	50-70 days	Conservative; inbound leads self-qualify but require more discovery to confirm budget authority

Funnel Conversion Rate Assumptions



Funnel Stage	Conversion Rate	Volume Required (M6 target)	Primary Driver	Basis
TAM to SAM	40%	7,200 firms	Construction management software adoption rate	Industry analyst estimate; Construction Technology Report 2025
SAM to Aware	30%	2,160 firms reached	Combined channel reach across all programs	Conservative estimate; cross-sell channel adds warm accounts directly
Aware to Interested	20%	432 firms	Messaging resonance; content quality; outreach personalisation	Beta conversion rate from awareness touchpoint to meeting: 22%
Interested to Qualified	40%	173 firms	Discovery quality; BANT confirmation by SDR and specialist AE	Win-loss review: 38% of interested prospects confirmed BANT in adjacent deals
Qualified to In Evaluation	80%	138 firms	Demo quality; reference access; implementation scoping	Beta cohort: 83% of qualified beta prospects progressed to evaluation
In Evaluation to Closed-Won	72%	100 customers	Reference quality; pricing fit; champion strength	Beta cohort: 9 of 12 beta customers converted to paid; adjusted for new-logo mix

Sales Enablement Requirements

The specialist sales team requires a defined enablement program before month 1 go-live. The minimum viable enablement package for launch includes: a two-day new-product immersion with the product team covering the full product, the integration model, and the beta customer stories; a competitive battlecard covering each of the five competitive alternatives including the

manual process; a discovery question framework tailored to the finance buyer conversation; a demo environment with a realistic mid-market construction firm dataset; and a reference customer program with four to six beta customers available for peer reference calls.

The existing 14-person AE team requires a lighter enablement program focused on warm-introduction mechanics: a one-day session on identifying finance contacts in their accounts, how to position the new product in a one-to-two-sentence introduction, and how to make the handoff to the specialist team without risking the existing-customer relationship.

Compensation and Incentives

AE compensation for the specialist new-product team is structured as a base-plus-variable model with an on-target earnings of \$140,000 to \$160,000 at plan. Variable is 40 percent of OTE, split equally between pipeline creation (leading indicator) and closed-won ARR (lagging indicator). During months 1 and 2 when closed revenue is expected to be low, a ramp quota applies: 40 percent of full-run quota in month 1, 70 percent in month 2, full quota from month 3 onward.

The existing AE team receives a cross-sell referral fee of \$500 per new-product deal that closes within 90 days of a qualified introduction. This fee is paid regardless of whether the AE is on a core-platform quota attainment above or below target, removing the incentive not to invest time in cross-sell activity during difficult core-platform periods.

SDR compensation is base-plus-variable with OTE of \$65,000 to \$75,000. Variable is tied to qualified meetings booked and progressed to evaluation stage, not to closed revenue. This avoids gaming behaviour where SDRs book unqualified meetings to hit meeting-count targets.

Sales Operations

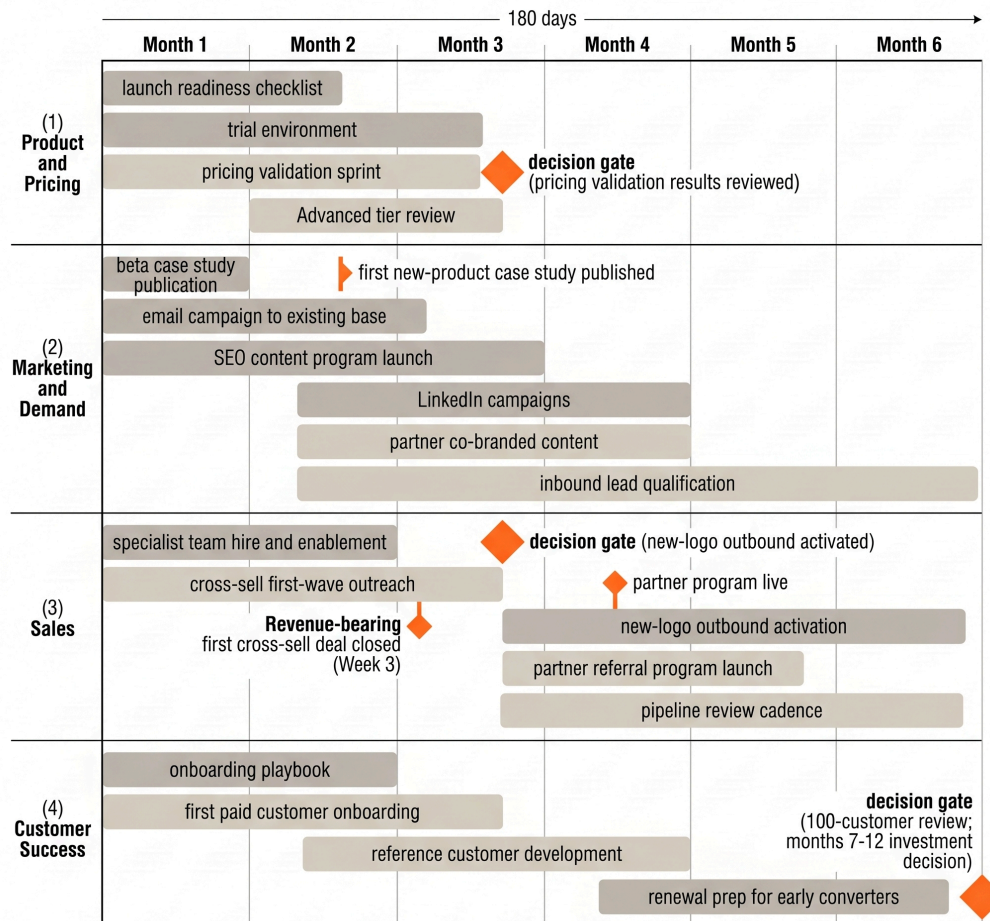
The new product requires a dedicated pipeline within the Client's existing CRM (Salesforce or HubSpot, per the Client's current stack). The pipeline stages must be configured to reflect the new-product sales motion rather than using the core-platform stages, which have different duration expectations and different required evidence at each stage. The SDR and specialist AEs must have separate pipeline views from the existing AE team to allow accurate forecasting.

A weekly pipeline review for the new-product team is required from month 2 onward, covering: deals by stage, stage conversion rates versus target, deals at risk (stalled more than 14 days at any stage), and net new pipeline added in the week. A monthly forecast review with the Head of Sales and the New Product Sales Lead aligns on trajectory toward the monthly target.

SECTION 8

Six-Month Launch Sequence

Diagram 2: Launch Sequence



Month 1: Internal Readiness

Workstream	Activity	Owner	Success Criteria
Hiring	New Product Sales Lead offer extended and accepted; Specialist AE 1 offer extended; SDR offer extended; Demand Gen Manager offer extended	Head of Sales; Head of Marketing	All month-1 hires confirmed before week 2
Sales enablement	Two-day product immersion for specialist team; competitive battlecards drafted; discovery framework written; demo	Head of Product; New Product Sales Lead	Specialist AE 1 and SDR certified on demo and discovery by end of month

Workstream	Activity	Owner	Success Criteria
	environment configured with beta customer dataset		
Existing AE enablement	Half-day cross-sell introduction training for existing 14 AEs; cross-sell incentive structure announced; top-60 cross-sell account list distributed	New Product Sales Lead; Head of Sales	All 14 AEs confirm awareness of top cross-sell accounts in their portfolios
Pricing	Beta customer pricing uplift communication drafted; A/B test offer structures defined; beta-loyalty rate approved	Head of Product; CFO	A/B test structure agreed before first cross-sell outreach
Customer success	Onboarding playbook written; CSM hire process started	Head of Customer Success	Onboarding playbook reviewed and approved
Content	First two beta case studies drafted; editorial calendar for months 1-6 approved; SEO keyword research complete	Demand Gen Manager (incoming); Head of Marketing	Case study drafts shared with beta customers for approval

Month 2: First-Wave Launch

Workstream	Activity	Owner	Success Criteria
Cross-sell	Top-60 accounts contacted; first finance-buyer introductions made; 15 qualified meetings targeted	Existing AE team + Specialist AE 1	10 qualified cross-sell conversations open by end of month
Content	First beta case study published; email campaign to finance contacts in existing base launched; LinkedIn targeting campaign live	Demand Gen Manager	Case study live; email open rate above 28%; 50 inbound leads from email campaign
New-logo prep	Target account list for outbound finalised and loaded into CRM; outbound sequence templates written and reviewed	SDR; New Product Sales Lead	Target list approved; sequences loaded in CRM
Pricing validation	A/B offer test running across cross-sell cohort	New Product Sales Lead; Head of Product	Minimum 20 offer presentations completed by end of month
Partnerships	Partnership program designed; two accounting firm partners approached	Head of Marketing; New Product Sales Lead	Partner program term sheet drafted; at least one accounting firm in active discussion

Workstream	Activity	Owner	Success Criteria
Customer success	CSM hire finalised; first paid customers (from cross-sell conversions) in onboarding	Head of Customer Success	First paid customer live on new product by end of month

Month 3: First Decision Gate

Month 3 is the first formal review point. The executive team evaluates two specific questions: does the pricing hold at the recommended levels (or does the A/B test data indicate adjustment is needed), and is the cross-sell conversion rate tracking toward the 45-customer target for months 1 through 6.

Workstream	Activity	Owner	Success Criteria
Pricing gate	A/B test results reviewed; final pricing decision made for remainder of year; beta-loyalty rate expiry communicated	CFO; Head of Product	Pricing decision documented and communicated to sales team before month 4
New-logo outbound	Specialist AE 2 onboarded; outbound sequences launched; first new-logo meetings targeted	New Product Sales Lead	30 new-logo first meetings by end of month
Cross-sell	Wave 2 cross-sell accounts (accounts 61-120) contacted	Existing AE team + Specialist AE 1	Cumulative 25 cross-sell deals closed or in evaluation
Content scaling	SEO content cluster reaching 8 published pieces; second case study published	Demand Gen Manager	Organic search impressions growing week-on-week; 2 inbound qualified leads
Partners	First partner program contracts signed; co-branded content produced	Head of Marketing	Minimum 2 accounting firm partners live in program
Decision gate	Board-level review: pricing validation results; conversion rate versus target; channel mix versus plan; months 4-6 resource decisions	CEO; CFO; Head of Sales	Clear go/adjust/pause decision on each channel documented

Month 4: Channel Expansion

If the month 3 gate confirms the cross-sell trajectory and pricing hold, month 4 activates the partner channel and scales new-logo outbound. The risk of activating both simultaneously is manageable because the partner channel requires minimal team bandwidth in its initial phase; accounting firm partners generate referrals independently.

Workstream	Activity	Owner	Success Criteria
Partner referral	First partner referrals entering pipeline; partner enablement sessions run	New Product Sales Lead	5 partner-referred qualified leads by end of month
New-logo outbound	Both specialist AEs at full quota run rate; SDR cadence at full capacity	New Product Sales Lead	50 new-logo qualified opportunities cumulative
Cross-sell	Wave 3 accounts (121-180) contacted; Specialist AE CSM handoffs running smoothly	Existing AE team	Cumulative 35 new-product customers
Content	Calculator tools live (close-time estimator, reconciliation rework calculator); third case study published	Demand Gen Manager	Calculator tools generating email captures; 6 inbound qualified leads cumulative
Sales ops	Pipeline review cadence established; monthly forecast call institutionalised	New Product Sales Lead	Forecast methodology agreed; first written forecast produced

Month 5: Sales Productivity Review

Month 5 is the point where the specialist AE team has been running for three full months and sales productivity data is statistically meaningful. The New Product Sales Lead reviews actual quota attainment versus ramp schedule and makes the first explicit hiring recommendation for months 7 through 12.

Workstream	Activity	Owner	Success Criteria
Sales productivity	AE ramp review: pipeline coverage, close rates, average deal size versus assumptions; hire recommendation for months 7-12	New Product Sales Lead; Head of Sales	Hire plan for months 7-12 approved by CEO before month 6
Content scaling	Content cadence at 4 pieces per month sustained; inbound leads now double-digit monthly	Demand Gen Manager	12+ inbound qualified leads in month 5
Partner	Third and fourth accounting firm partners recruited; first partner-sourced deal closed	Head of Marketing	First partner-closed customer live
Customer success	Reference customer program formalised; 6 beta customers available as peer references	Head of Customer Success	Reference customer list approved and distributed to sales team
Renewal prep	First wave of cross-sell customers approaching 6-month mark; renewal conversations initiated	CSM	No cross-sell customer in churn risk before month 6 review

Month 6: Quarterly Review and Scale Decision

Month 6 is the second formal gate: the 100-customer target is assessed, the operating model for months 7 through 12 is confirmed, and the board is briefed on actual versus plan. Three outcomes are possible and each has a defined response:

- **On track (85-100+ customers):** Scale per the 12-month plan. Add headcount as planned. Increase channel investment proportionally.
- **Behind target (60-84 customers):** Diagnose root cause by channel. If cross-sell is behind, investigate AE engagement. If new-logo is behind, review outbound conversion rates. Adjust channel mix and resurface the pricing question before scaling further.
- **Materially behind (under 60 customers):** Formal review of positioning and segment assumptions. Engage Clixlogix Consulting Practice for a rapid go-to-market audit before committing months 7-12 investment.

SECTION 9

Twelve-Month Scaling Plan

The operating model in months 7 through 12 is structurally different from the foundation phase. The cross-sell pool from existing customers begins to exhaust by month 5 to 6; the growth engine in months 7 through 12 is direct new-logo sales and content-driven inbound. This means the team, the channel investment, and the success metrics all shift.

Foundation Phase to Scaling Phase

Dimension	Months 1-6 (Foundation)	Months 7-12 (Scaling)
Primary growth channel	Existing-customer cross-sell	Direct new-logo outbound; content-driven inbound
Sales team size	2 specialist AEs + 1 SDR	4-5 specialist AEs + 2 SDRs
Marketing investment	Content production + email; modest paid	Content + paid search + paid social + field events
Partner program	2-4 referral partners; early stage	8-12 referral partners; first reseller conversations
Customer success	1 CSM; onboarding-focused	2 CSMs; renewal and expansion-focused
Average deal size target	\$18,000 ACV	\$22,000 ACV (mix shift toward Advanced tier)
Monthly new customer target	17 per month average	33 per month average (500 by end of month 18)
CAC target	\$14,000 (blended)	\$10,000 (blended; improving as inbound scales)

Decision Points — Months 7 Through 12

Investment in months 7 through 12 is conditioned on three signals from the month 6 review:

- **Content-driven inbound producing qualified leads.** If inbound is generating fewer than 8 qualified leads per month by month 6, the content strategy is not working and the month 7 paid distribution budget is redirected to outbound support rather than inbound amplification.
- **AE ramp time at or below 90 days.** If the specialist AEs hired in months 1 and 3 have not reached 80 percent of quota by month 4, the hiring plan for months 7 through 12 slows from two additional AEs to one, and the SDR headcount expansion is deferred.

- **Net Revenue Retention above 95 percent at month 6.** If early cross-sell customers are churning or downgrading, the product-market fit assumption requires re-examination before scaling the customer acquisition investment.

Path from 100 to 500 Customers

At the 100-customer baseline established in month 6, reaching 500 customers by month 18 requires adding 400 customers across a 12-month period, or approximately 33 new customers per month. At an assumed average ACV of \$22,000, this produces \$11M in new ARR over the period, bringing the new product to approximately \$13M ARR at month 18 (accounting for early renewals).

The primary constraint on this trajectory is AE productivity. Each specialist AE at full run rate is expected to close 8 to 10 new customers per month across both cross-sell and new-logo. To reach 33 per month consistently requires 4 to 5 specialist AEs at full run rate, which means the hiring plan for months 7 through 9 is non-negotiable; delays in hiring directly compress the month-18 customer target.

SECTION 10

Operating Model and Team Build

The plan is designed to be executed by the existing organisation with selective additions, not by building a separate division. The structural principle is that the new product has a dedicated commercial team (sales, customer success, and a portion of marketing) while sharing infrastructure with the core platform business (CRM, marketing technology, legal, finance, and HR). This avoids the overhead of a full divisional structure while ensuring the new product's commercial priorities do not get crowded out by the core platform's larger revenue base.

Team Structure — Month 1 Through Month 6

Role	Current State	Action Required	Timing	Estimated Loaded Annual Cost
New Product Sales Lead	Does not exist	New hire; external candidate required	Month 1	\$180K-\$220K
Specialist AE 1	Does not exist	New hire; construction finance or adjacent SaaS AE experience required	Month 1	\$130K-\$160K OTE
Specialist AE 2	Does not exist	New hire; same profile as AE 1	Month 3	\$130K-\$160K OTE
Sales Development Representative	Does not exist	New hire; outbound SDR with B2B SaaS experience	Month 1	\$65K-\$75K OTE
Sales Engineer	Partial — product team has 1 member with pre-sales experience	Reassign from product team for 50% of time; assess full dedicated hire by month 3	Month 2	\$120K-\$140K (50% of loaded cost)
Demand Generation Manager	Does not exist	New hire; content and demand gen with construction-adjacent or finance-adjacent experience preferred	Month 1	\$90K-\$110K

Role	Current State	Action Required	Timing	Estimated Loaded Annual Cost
Customer Success Manager (new product)	Does not exist	New hire; onboarding and renewal management focus	Month 2	\$80K-\$100K
Existing AE team (14 AEs)	Exists; enabled for cross-sell introductions	Half-day training; incentive structure adjustment; no capacity reduction on core quota	Month 1	Incremental cost: cross-sell referral fees only
Existing marketing team (6 people)	Exists; running core platform programs	Add new-product workstream; genuine capacity risk — monitor monthly	Month 1	Incremental cost: content production budget

Capacity Risks

Two genuine capacity risks exist in the operating model and must be addressed explicitly rather than managed by assumption:

Marketing team overextension. The existing 6-person marketing team is running content, demand generation, and field marketing for a \$12M ARR core platform business. Adding a new product workstream without additional headcount will reduce quality and output on both programs. The Demand Generation Manager hire in month 1 is intended to absorb the new-product workstream, but the head of marketing must explicitly protect existing team capacity by reducing or pausing lower-priority core-platform activities during months 1 through 3. This is a real trade-off that the leadership team must acknowledge.

Sales operations bandwidth. The existing sales operations function (if one exists) is presumed to be managing the 14-person AE team's CRM, reporting, and commission calculations. Adding a new pipeline, new commission structures, and new reporting for the specialist team requires either additional ops capacity or a deliberate simplification of the new team's operational requirements to fit within existing capacity.

Org Chart Context

During months 1 through 6, the New Product Sales Lead reports directly to the Head of Sales. The Demand Generation Manager reports to the Head of Marketing but has a strong dotted-line relationship with the New Product Sales Lead on new-product campaigns. The Customer Success Manager reports to the Head of Customer Success.

This reporting structure deliberately avoids creating a new-product division with its own leadership overhead. The risk is that the Head of Sales and Head of Marketing each have a dual-product responsibility without a compensating increase in their own capacity. Both leaders must be explicitly aligned on the priority weighting between core platform and new product before month 1 begins.

SECTION 11

Metrics Framework

The metrics framework is designed around a single principle: the people running this launch should never be surprised by bad news. Every decision-triggering signal described in this plan must be visible in the weekly and monthly reporting before it becomes a crisis. The metrics below are selected because they are leading enough to allow course correction and lagging enough to reflect genuine commercial progress.

Leading Indicators

Metric	Definition	Target: Month 3	Target: Month 6	Owner	Cadence
Cross-sell introductions made	Number of qualified introductions from existing AEs to finance buyer contacts in their accounts	30	75	New Product Sales Lead	Weekly
New-logo first meetings booked	Number of qualified first meetings with non-customer firms	40	140 cumulative	SDR	Weekly
Qualified pipeline created (all channels)	Number of opportunities meeting BANT criteria entering pipeline	55	170 cumulative	New Product Sales Lead	Weekly
Pipeline coverage ratio	Value of qualified pipeline divided by monthly closed-won target	3.0x	2.5x	New Product Sales Lead	Weekly
Content MQLs generated	Inbound leads from content programs meeting minimum qualification threshold	5/month	15/month	Demand Gen Manager	Weekly
Partner referrals entered	Qualified referrals received from accounting firm partners	0	8 cumulative	Head of Marketing	Monthly
Demo completion rate	Percentage of qualified leads that	65%	70%	Specialist AEs	Weekly

Metric	Definition	Target: Month 3	Target: Month 6	Owner	Cadence
	complete a product demonstration				

Lagging Indicators

Metric	Definition	Target: Month 3	Target: Month 6	Owner	Cadence
New product customers (cumulative)	Total paying customers on the new product	25	100	New Product Sales Lead	Monthly
New product ARR (cumulative)	Total annual recurring revenue from new product subscriptions	\$360K	\$1.6M	CFO	Monthly
Net new ARR per month	New ARR added in the calendar month, net of any downgrades or churn	\$100K	\$320K	CFO	Monthly
Customer Acquisition Cost (blended)	Total sales and marketing spend in period divided by new customers acquired in period	N/A (insufficient data)	Below \$16,000	CFO	Quarterly
Sales cycle length (average)	Days from qualified opportunity created to closed-won, by channel	40d cross-sell ; N/A outbound	42d cross-sell ; 78d outbound	New Product Sales Lead	Monthly
Win rate (qualified to closed-won)	Percentage of qualified opportunities that close as won	60% (cross-sell)	65% cross-sell ; 45% outbound	New Product Sales Lead	Monthly
Net Revenue Retention (early cohort)	ARR retained from month-1 and month-2 customers at month 6, including expansion	N/A	Above 95%	Head of Customer Success	Monthly

Metric	Definition	Target: Month 3	Target: Month 6	Owner	Cadence
Beta-to-paid conversion rate	Percentage of the 12 beta customers who converted to paid subscription	75% (9 of 12)	100% target	New Product Sales Lead	One-time

Decision Triggers

Three types of decisions are triggered by specific metric patterns. Each trigger has a defined response that prevents the launch from drifting into a state where resources are committed to a motion that the data has already indicated is not working.

Decision Type	Triggering Pattern	Required Response	Decision Owner
Scale	Month 6 customer count at or above 95; Win rate above 60% on cross-sell and 40% on outbound; NRR above 100%	Authorise full months 7-12 headcount plan; increase channel investment proportionally; submit updated board case for expansion budget	CEO + Head of Sales
Adjust — pricing	A/B test in month 2-3 shows Professional tier conversion rate more than 15 percentage points below control; or average deal size materially below \$14,400	Convene pricing review within 10 business days; test intermediate price point at \$980/month; delay Advanced tier price increase	CFO + Head of Product
Adjust — channel mix	Cross-sell exhausting faster than projected (fewer than 150 accessible accounts remaining by month 4); OR outbound conversion rate below 30% qualified-to-close by month 5	Shift incremental budget from cross-sell enablement to content distribution and partner acceleration; consider paid search for demand-side acceleration	Head of Marketing + New Product Sales Lead
Adjust — segment	Win rates are high in a sub-segment not originally targeted (e.g., specialty subcontractors with high project volume); OR low across all cross-sell accounts despite good pipeline coverage	Conduct a rapid segment re-evaluation over 2 weeks; adjust ICP definition before months 7-12 headcount plan is finalised	New Product Sales Lead + Head of Product

Decision Type	Triggering Pattern	Required Response	Decision Owner
Pull back	Month 6 customer count below 50; Win rate below 30% across all channels; NRR below 80% on early cohort; no identifiable root cause with a defined fix	Halt new headcount additions; reduce content and outbound investment to minimum viable; commission a formal GTM audit before any further capital commitment	CEO + CFO

SECTION 12

Risk Register

Risks are scored on a 1-5 scale for likelihood and impact. Severity is the product of the two scores. Risks with severity 15 or above require active management and a named mitigation plan in place before month 1.

#	Risk	Category	Likelihood	Impact	Severity	Owner	Mitigation
R-01	Procore Financial Management launches before month 6, creating the perception that the category is addressed by the platform incumbent	Competitive	3	5	15	New Product Sales Lead	Competitive battlecard specifically addresses Procore FM gap: no GL write-back to Sage or Foundation; no AIA G702/G703 generation; no retainage workflow. Reference customers briefed on Procore comparison talking points. If Procore launches in beta before M3, accelerate case study publication to establish proof before Procore reaches the target market.
R-02	Existing AE team under-engages with cross-sell introductions due to insufficient incentive or unfamiliarity with the finance buyer conversation	Commercial	4	5	20	Head of Sales	Cross-sell introduction ask is deliberately narrow: AE only needs to make the introduction, not run the discovery. \$500 referral fee announced with clear payment timeline before M1. SDR supports finance contact discovery for accounts where AE has no direct relationship. Cross-sell introduction count tracked weekly in sales team meeting.
R-02	Beta-to-paid conversion underperforms at the recommended price uplift; price resistance above what van Westendorp data indicated	Commercial	3	5	15	CFO + Head of Product	A/B test in months 1-2 with beta-loyalty rate option; pricing decision gate at end of month 3 with data; fallback to \$1,000/month Professional tier if conversion rate below threshold

#	Risk	Category	Likelihood	Impact	Severity	Owner	Mitigation
R-03	Marketing team capacity becomes a bottleneck; quality of both core-platform and new-product programs degrades	Operating	4	4	16	Head of Marketing	Demand Generation Manager hired in month 1, not month 3; head of marketing explicitly reduces lower-priority core-platform activities before month 2; monthly capacity review with CEO
R-04	New Product Sales Lead hire does not materialise in month 1; specialist AE team has no leadership for the first 60 days	Operating	2	5	10	Head of Sales	Sourcing process begins 6 weeks before month 1; interim leadership from Head of Sales if hire is delayed beyond month 1 week 3; recruitment agency engaged as backup
R-05	Competitor response: Vendor B (mid-market specialist) reduces pricing or accelerates feature development in response to the Client's launch	Commercial	2	4	8	New Product Sales Lead	Competitive monitoring program in place; battlecard updated monthly; win-loss review conducted quarterly; pricing defense protocol defined before launch
R-06	Content-driven inbound produces no qualified leads by month 4, consuming budget with no pipeline contribution	Commercial	3	3	9	Demand Gen Manager	Content performance reviewed at end of month 3; if organic search producing zero qualified leads, budget redirected to paid distribution and LinkedIn ABM; inbound investment does not scale until it is producing
R-07	Partner accounting firms are slower to produce referrals than anticipated; partner channel contributes fewer than 5 qualified referrals by month 6	Commercial	3	3	9	Head of Marketing	Partner channel is sized as 15% of month 1-6 target (15 customers), not a critical path channel; delay does not put the 100-customer goal at risk if cross-sell and outbound perform; partner investment is capped until referral quality is demonstrated
R-08	Implementation complexity for some firm types is higher than the beta cohort indicated; customer onboarding takes longer than 18 days on average	Operating	2	4	8	Head of Customer Success	Implementation time tracked from week 1 of live customers; if average exceeds 25 days in month 2, escalate to Head of Product for integration improvements; CSM capacity reviewed against actual onboarding load monthly

#	Risk	Category	Likelihood	Impact	Severity	Owner	Mitigation
R-09	Core platform customer churn increases because cross-sell introductions are perceived as unwanted up-selling, damaging existing account relationships	Commercial	2	4	8	Head of Customer Success	Cross-sell introductions are made only where the AE has confirmed an existing finance-side relationship or the customer has expressed interest; no cold-introduction policy for cross-sell; CSM monitors sentiment in cross-sell accounts monthly
R-10	Finance director or CFO buyer is harder to reach in existing accounts than the AE team estimated; introductions do not materialise at the projected rate	Commercial	3	4	12	New Product Sales Lead	AE enablement specifically covers how to identify finance contacts using LinkedIn and accounting firm relationships; SDR supports finance contact discovery for accounts where AE does not have a direct relationship; target 60 introductions in month 1-2, not 30
R-11	Beta customers who committed to being reference customers withdraw or become unavailable during the critical months 2-4 launch window	Commercial	2	3	6	Head of Customer Success	Reference customer program formalised with CSM ownership; backup reference list of 4 additional willing beta customers maintained; new paid customers enrolled in reference program from month 3
R-12	Board adjusts the \$2.4M budget downward before month 6 in response to core platform commercial pressure, constraining the new-product investment mid-launch	Operating	2	5	10	CEO + CFO	New-product budget is ring-fenced as a separate line item before month 1; monthly board update on new-product trajectory maintains visibility; pull-back protocol defined in metrics framework so a budget adjustment does not become an uncontrolled cut

SECTION 13**Recommendation Summary**

Core recommendation: Enter the market now, through the existing customer base first, with a specialist team of four people, targeting CFOs and finance directors at mid-market general contractor firms, at a Professional tier price of \$1,200 per month billed annually. Build the new-logo and inbound channels in parallel so that when the cross-sell pool exhausts around month 4 to 5, the replacement channels are already producing.

Why Delay Fails

The argument for delaying launch typically takes the form of waiting until the product is more complete, waiting until a full specialist team is in place, or waiting until the competitive environment is clearer. Each of these arguments has a cost that the delay-camp underweights.

The Client has 12 beta customers who have validated the product's value and who are currently paying nothing or a nominal amount. Every month of delay is a month of foregone revenue from the most convertible cohort available. The beta customers' patience is not unlimited; extended delay without a clear commercial offer signals product stagnation and increases the risk that they revert to their manual processes or evaluate alternatives.

Delay also allows the two incumbent enterprise vendors, who have both announced product roadmap improvements in the construction finance area in their 2025 communications, additional time to close the capability gap. The 12-to-18 month window in which the new product can claim genuine differentiation from the incumbents is not permanent.

Why Broad Launch Fails

The alternative to the focused segment approach described in this plan is launching across all segments simultaneously, targeting large enterprise contractors, specialty subcontractors, and mid-market general contractors at the same time. This approach has surface appeal because it maximises the addressable pool.

In practice, a broad launch with the team size described in this plan produces thin coverage across multiple segments, each with different messaging requirements, different competitive landscapes, and different sales cycles. The specialist AE team is sized for focused execution; spreading them across three segments reduces conversion rates in all three. The content program cannot produce segment-specific proof points at the required quality across multiple audiences simultaneously. The result is a launch that appears active but produces insufficient traction in any single segment to make a credible case for scaling investment.

Conditions Under Which to Revisit

Three conditions would require a formal revisit of this plan before the month 6 gate:

- **The pricing A/B test shows conversion materially below plan.** If the month-3 pricing gate reveals that the Professional tier uplift is producing conversion rates more than 20 percentage points below the beta-era rate, the plan should be revisited before scaling outbound investment at the new price points.
- **A material competitive development occurs.** If one of the incumbent enterprise vendors acquires a mid-market specialist tool or announces an aggressive construction-specific pricing initiative before month 4, the positioning and pricing assumptions must be re-evaluated immediately.
- **The cross-sell pool is materially smaller than estimated.** The plan assumes 220 accessible cross-sell accounts. If the account review in month 1 reveals that fewer than 140 accounts have an identifiable finance contact, the month-1 to 2 customer targets are materially at risk and the new-logo outbound timeline must be compressed.

APPENDIX

Appendix

A. Beta Customer Interview Synthesis

12 beta customers were interviewed between June and July 2025. All participants are referenced by role and firm profile only. The following themes emerged consistently across the cohort:

- Month-end close time was the highest-salience pain point, cited by 10 of 12 participants as the primary reason they joined the beta program.
- Project-level margin visibility was the second-highest salience pain, cited by 9 of 12 participants; 7 described specific instances where a margin surprise reached the board or the CEO.
- Integration with existing accounting software was the primary evaluation criterion, ahead of feature set and price. Participants needed confidence that the new product would read from and write to their accounting system without creating a new reconciliation requirement.
- Implementation burden was a significant concern; 8 of 12 participants mentioned their previous experience with a failed or delayed implementation of another construction software tool as a reference point. The 18-day average implementation time in the beta cohort was the most-cited reason for satisfaction with the product.
- Willingness to serve as a reference customer was high: 8 of 12 participants agreed to participate in a structured reference program, and 4 of those 8 agreed to appear in a written case study.

B. Competitive Analysis Summary

Vendor	Category	Primary Strength	Primary Weakness	Pricing Range (est.)	Target Segment
Vendor A	Incumbent enterprise finance platform	Broad feature set; established integration ecosystem; strong brand in enterprise segment	Complex implementation; high price; not construction-specific; requires professional services to configure for construction accounting	\$60K-\$200K/year + PS fees	Enterprise GCs; \$500M+ revenue

Vendor	Category	Primary Strength	Primary Weakness	Pricing Range (est.)	Target Segment
Vendor B	Mid-market specialist	Construction-aware feature set; reasonable price; faster implementation than Vendor A	Limited multi-entity capability; weaker integration model; slower product development cycle	\$18K-\$48K/year	Mid-market GCs; overlapping segment
Vendor C	Recently funded entrant	Modern UI; strong reporting features; aggressive pricing	Limited construction-specific features; no established reference base; integration model immature	\$8K-\$24K/year	SMB to low mid-market
Vendor D	Specialist point tool	Solves one problem (project cost tracking) very well; low price; fast implementation	Does not address financial close, board reporting, or accounting system integration	\$4K-\$10K/year	Small GCs; project-level buyers (not finance)
Manual process (spread sheets + workarounds)	Incumbent alternative	Zero software cost; familiar to finance team; no implementation risk	Time-consuming; error-prone; produces no early warning of project issues	Zero direct cost; significant indirect cost in finance team time	All segments; primary competitor across the cohort

C. Framework References

- SaaS Pricing Benchmarks 2025 — OpenView Partners. Applied to price point calibration and tier structure design.
- Bessemer State of the Cloud 2025. Applied to CAC and LTV benchmarks for mid-market B2B SaaS.
- Gartner B2B Buyer Survey 2024. Applied to buying process structure assumptions and trigger event analysis.
- SiriusDecisions Go-to-Market Framework (Forrester). Applied to channel mix design and sales motion sequencing.
- Van Westendorp Price Sensitivity Measurement methodology. Applied to beta customer pricing research design.
- Clixlogix Consulting Practice Go-to-Market Design Framework. Applied to segment prioritisation, channel sequencing, and decision trigger design throughout this engagement.

D. Glossary

Term	Definition
ACV (Annual Contract Value)	The annualised value of a subscription contract. A \$1,200/month deal on annual billing has an ACV of \$14,400.
AIA G702/G703	Standard American Institute of Architects application-for-payment forms used in commercial construction. G702 is the cover sheet; G703 is the continuation sheet by schedule-of-values line item. The standard billing format for mid-market general contractors.
Job cost accounting	The practice of tracking all costs (labour, materials, subcontract, equipment, overhead) against individual construction project cost codes. The source of project-level P&L in construction and the primary data source for the new product.
Job-cost-to-GL reconciliation	The process of reconciling job cost data in the project management system (Procore, Viewpoint) with entries in the general ledger (Sage 300 CRE, Foundation Software). The primary source of month-end close delay in the target segment.
Percentage-of-completion (POC)	The revenue recognition method required for long-term construction contracts under ASC 606. Revenue is recognised based on the percentage of contract work completed, requiring accurate and current job cost data.
Retainage	A percentage (typically 5-10%) of each payment application that the owner withholds until substantial completion of the project. Appears as a receivable on the GC balance sheet and requires careful tracking across projects and subcontract tiers.
Sage 300 CRE	Sage 300 Construction and Real Estate, formerly Timberline. One of the two dominant accounting systems for mid-market general contractors in North America. Known for its job cost module and its complexity relative to general-purpose accounting software.
Foundation Software	A construction-specialist accounting platform used by approximately 35,000 contractors in North America. Popular with mid-market GC firms for its construction-native chart of accounts and job cost reporting.
CFMA	Construction Financial Management Association. The primary professional association for construction finance executives in North America. 98 chapters; approximately 10,000 members; national conference in June.
WIP schedule (Work in Progress)	A schedule of all active construction contracts showing contract value, billings to date, costs incurred, and estimated cost to complete. Required for construction financial reporting and frequently requested by bonding agents and lenders.
BANT	Budget, Authority, Need, Timeline. A qualification framework for assessing whether a prospect is a genuine near-term buyer.
CAC (Customer Acquisition Cost)	Total sales and marketing spend in a period divided by the number of new customers acquired in that period.
Cross-sell	Selling an additional product to an existing customer. In this context, selling the new product to firms that already use the Client's core platform.

Term	Definition
ICP (Ideal Customer Profile)	The firmographic and behavioural profile of the customer that is most likely to buy, onboard successfully, and renew.
MQL (Marketing Qualified Lead)	A lead that has met a defined threshold of engagement with marketing content and is deemed ready for sales outreach.
NRR (Net Revenue Retention)	The percentage of ARR retained from a cohort of customers at a point in time, including expansion revenue and net of churn and contraction.
Van Westendorp PSM	Price Sensitivity Measurement — a survey-based pricing research methodology that identifies acceptable, expected, and too-expensive price points from buyer responses.

End of Document

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