

# RelayOps GTM Launch: Marketing Plan



90-Day Marketing Plan   RelayOps GTM Launch · RelayOps · B2B · Generated 2026-07-26

RelayOps should use the first 30 days to validate its highest-value ICP and differentiated messaging, the next 30 days to build a proof-oriented launch system, and the final 30 days to activate targeted demand generation. The program focuses on US mid-market companies with 200–2,000 employees, fragmented workflows across at least three systems, and visible handoff or process-risk problems. All three supplied personas should be addressed through role-specific messages leading to a tailored workflow diagnostic and demo.

# Overview

## Executive Summary

RelayOps should use the first 30 days to validate its highest-value ICP and differentiated messaging, the next 30 days to build a proof-oriented launch system, and the final 30 days to activate targeted demand generation. The program focuses on US mid-market companies with 200–2,000 employees, fragmented workflows across at least three systems, and visible handoff or process-risk problems. All three supplied personas should be addressed through role-specific messages leading to a tailored workflow diagnostic and demo.

## Final Recommendation

Run the plan as a gated launch: validate ICP and positioning with the three supplied personas before scaling content or paid promotion. Instrument demo-request tracking first, publish the diagnostic-led conversion path second, and activate targeted search, social, email, and sales outreach only after proof language and objections have been pressure-tested. Review qualified demo requests and sales acceptance weekly, and shift resources toward the messages, personas, and use cases producing the strongest qualified response.

### Plan Dimensions

|                       |                |
|-----------------------|----------------|
| VARIANT               | AUDIENCE SCOPE |
| 90-Day Marketing Plan | multi_persona  |
| TIME HORIZON          | MARKET TYPE    |
| Days 1–90             | B2B            |
| STRATEGY FRAME        | GEOGRAPHY      |
| hybrid                | US             |

## Strategic Core

### Strategic Core

#### BUSINESS OBJECTIVE

Define and validate the highest-value ICP, establish differentiated messaging, build a launch-ready marketing plan, pressure-test positioning through a virtual focus group, and execute a 90-day content program that drives qualified demo requests.

#### TARGET OUTCOME

A validated ICP and messaging system, a launch-ready diagnostic and demo journey, and an operating 90-day content and demand program with baseline funnel data.

#### PRIMARY GOAL METRIC

Sales-accepted qualified demo requests

#### POSITIONING STATEMENT

For US mid-market operations teams managing fragmented cross-functional workflows, RelayOps is a workflow-intelligence platform that connects operational signals across Slack, Jira, Salesforce, and HubSpot to reveal handoff bottlenecks, ownership gaps, and process risk, then recommends measurable improvements without replacing existing systems.

#### CORE PROMISE

See where cross-system work is breaking, prioritize the risks that matter, and improve operational outcomes using evidence already present in the tools teams use.

#### PRIMARY MESSAGE

Turn fragmented workflow signals into clear, practical action before missed handoffs become customer or financial problems.

#### STRATEGIC THESIS

A diagnostic-led launch will outperform broad category promotion because actively researching mid-market operations buyers need to recognize a specific cross-system handoff problem, trust the integrations and analysis, and justify measurable value to a multi-stakeholder committee before requesting a demo.

#### COMMERCIAL GOALS

- Generate qualified requests for a tailored workflow diagnostic and product demo.
- Identify which supplied persona, operational trigger, and use case produce the strongest sales-qualified response.
- Create a measurable conversion path supporting the 30–90 day sales-led buying cycle.

#### DIFFERENTIATORS

- Cross-system handoff intelligence across supported collaboration, project-management, and CRM tools.
- Automated workflow reconstruction and ownership-gap detection.
- Prioritized, explainable alerts and practical AI-generated recommendations.
- Diagnostic-led entry and outcome tracking focused on measurable improvement.

#### GUARDRAILS

Do not claim unverified ROI, integration speed, mapping accuracy, privacy outcomes, or customer results.

Do not position RelayOps as replacing systems of record, BI platforms, or automation tools.

Use only the three supplied personas in audience targeting and message validation.

Scale paid activity only after conversion tracking, qualification criteria, and focus-group findings are documented.

Messaging Pillars

| Pillar                   | Message                                                                                                      | Supporting Points                                                                                                   |
|--------------------------|--------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------|
| Connected visibility     | See how work moves across teams and systems instead of analyzing each tool in isolation.                     | Connects supported Slack, Jira, Salesforce, and HubSpot signals.<br>Maps handoffs and highlights unclear ownership. |
| Practical risk detection | Find stalled work and recurring bottlenecks before they affect customers or commitments.                     | Prioritizes process-risk alerts.<br>Connects recommendations to observed workflow evidence.                         |
| Measurable improvement   | Focus teams on changes that can shorten cycle time, improve accountability, and demonstrate operational ROI. | Supports executive reporting.<br>Tracks interventions and pre/post outcomes, subject to validation.                 |

# Audiences

## Audience Strategy

### General and Operations Leader for Scaling Business

#### GROUP

Primary

#### BUYING ROLE

Executive operational sponsor and business-value approver

#### PRIORITY

primary

#### NEEDS

Cross-functional visibility

Operational accountability

Prioritized improvements

Executive-level outcome reporting

#### PAIN POINTS

- Recurring escalations and missed commitments
- Fragmented ownership across teams
- Operational risk becoming visible too late
- Difficulty quantifying improvement

#### MOTIVATIONS

Scale operations without increasing coordination failure

Protect customer and financial outcomes

Demonstrate measurable operational control

#### OBJECTIONS

Unclear ROI

Concern that RelayOps is another dashboard

Insufficient proof from a new entrant

#### MESSAGE ANGLE

Gain an evidence-based view of operational risk and prioritize changes that improve accountability and measurable performance.

#### BEST CONTENT TYPES

Roi Assessments

Buying Guides

Presentations

#### BEST CHANNELS

Targeted email

LinkedIn

Sales outreach

Virtual events

IT and Systems Operations Intelligence Manager

GROUP

Primary

BUYING ROLE

Technical evaluator and implementation gatekeeper

PRIORITY

primary

NEEDS

- Clear connector and data-scope details
- Explainable analysis
- Governance and privacy clarity
- Compatibility with the existing tool environment

PAIN POINTS

- Disconnected operational data
- Integration burden
- Unexplained alerts or recommendations
- Pressure to support automation without reliable process visibility

MOTIVATIONS

- Create connected insight without replacing core systems
- Reduce technical and governance risk
- Support practical, evidence-based improvements

OBJECTIONS

- Connector reliability
- Data access and privacy concerns
- Implementation effort
- AI recommendation explainability

MESSAGE ANGLE

Connect supported workflow signals into an explainable intelligence layer without replacing systems of record.

BEST CONTENT TYPES

- Spec Sheets
- Faqs
- Demos/product in action

BEST CHANNELS

- Sales outreach
- Webinars
- Targeted email
- LinkedIn

## Mid-Market Administrative Operations Leader

### GROUP

Primary

### BUYING ROLE

Operational champion and day-to-day workflow owner

### PRIORITY

primary

### NEEDS

Clear handoff ownership Earlier process-risk visibility Practical recommendations  
Reliable operating structure

### PAIN POINTS

- Missed handoffs
- Recurring bottlenecks
- Resource coordination complexity
- Change-management pressure

### MOTIVATIONS

Improve workflow reliability Reduce escalations and manual coordination  
Increase accountability and productivity

### OBJECTIONS

Fear of added operational complexity Unclear effort required to act on recommendations  
Concern that insights will not translate into change

### MESSAGE ANGLE

Expose missed handoffs and ownership gaps, then give teams practical steps to improve everyday execution.

### BEST CONTENT TYPES

Use Case Overviews & Assessments Checklists How Tos...

### BEST CHANNELS

Targeted email LinkedIn Webinars Sales outreach

## Positioning

### Positioning Strategy

#### STATEMENT

RelayOps gives US mid-market operations teams a connected, evidence-based view of cross-system workflows so they can detect handoff risk, clarify ownership, and implement measurable improvements without replacing the tools where work already happens.

#### CATEGORY FRAME

Operations intelligence software

#### MARKET PROBLEM

Operational work crosses collaboration, project-management, and CRM systems, leaving leaders unable to see stalled handoffs, recurring bottlenecks, and ownership gaps until they create escalations or customer impact.

#### DIFFERENTIATED FRAME

A neutral workflow-intelligence layer focused on cross-system handoffs, explainable risk prioritization, and measurable interventions rather than isolated dashboards or large transformation projects.

#### DO MESSAGES

- Lead with cross-system handoff visibility and practical operational outcomes.
- Explain that RelayOps complements existing systems.
- Use role-specific proof for operational, technical, and executive concerns.
- Offer a tailored workflow diagnostic as the primary conversion.

#### AVOID MESSAGES

- Avoid generic AI transformation claims.
- Avoid describing RelayOps as merely another analytics dashboard.
- Avoid guaranteed savings, cycle-time reductions, or integration timelines.
- Avoid unsupported claims of category leadership or customer adoption.

## Value Propositions

| Audience / Segment                                 | Proposition                                                                                                                    | Proof Direction                                                                                                         |
|----------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------|
| General and Operations Leader for Scaling Business | Identify the operational risks most likely to undermine growth and prioritize improvements with measurable executive outcomes. | Validate executive reporting, pre/post outcome tracking, and a workflow diagnostic tied to a specific business process. |
| IT and Systems Operations Intelligence Manager     | Create explainable workflow intelligence from supported systems without replacing systems of record.                           | Demonstrate connector scope, data flow, governance approach, handoff mapping, and alert explainability.                 |
| Mid-Market Administrative Operations Leader        | Find missed handoffs and unclear ownership, then turn the findings into practical workflow changes.                            | Show a representative workflow map, prioritized issue, recommendation, and measurable intervention path.                |

Positioning Contrasts

| Common Alternative                        | Limitation / Perception                                                                  | Product / Brand Contrast                                                                                                    |
|-------------------------------------------|------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------|
| Standalone dashboards or manual reporting | Shows metrics by system but may not reveal how work breaks between teams and tools.      | RelayOps focuses on cross-system handoffs, ownership gaps, and practical improvement recommendations.                       |
| Traditional process-mining programs       | Can be perceived as complex, lengthy, or designed for broader enterprise transformation. | RelayOps uses a scoped diagnostic-led entry intended to reach actionable workflow insight faster; timing must be validated. |
| Immediate automation                      | Automating an unclear or broken workflow can reinforce the wrong process.                | RelayOps first identifies observed handoff risk and improvement priorities, complementing rather than replacing automation. |

# Stages & Timeline

## Stage Plan

### Validate ICP and Positioning

TYPE

Time Period

TIME WINDOW

Days 1–30

OBJECTIVE

Confirm the highest-value ICP, establish differentiated messaging, and pressure-test it with all three supplied personas.

PURPOSE

Prevent unvalidated positioning and assumptions from being scaled into launch assets.

BELIEF TO CREATE

RelayOps addresses a consequential cross-system handoff problem in a differentiated and credible way.

CORE MESSAGE

RelayOps turns fragmented workflow signals into a connected view of handoff risk and practical improvement opportunities.

INITIATIVES

- ICP and Jobs-To-Be-Done validation
- Messaging matrix development
- Virtual focus group
- Measurement foundation

RECOMMENDED ASSETS

- ICP qualification brief
- Messaging matrix
- Virtual focus-group discussion guide
- Measurement specification

CHANNELS

- Virtual focus group
- Targeted interviews
- LinkedIn
- Email

CTAS

- Join the virtual focus group
- Request a workflow diagnostic

KPIS

- Focus-group participation across all three supplied personas
- Documented message resonance and objections
- Approved ICP qualification criteria
- Demo-request tracking operational



Build the Launch System

TYPE

Time Period

TIME WINDOW

Days 31–60

OBJECTIVE

Translate validated positioning into a conversion path, proof assets, sales enablement, and a 90-day content foundation.

PURPOSE

Give each supplied persona enough relevance and proof to advance toward a tailored diagnostic and demo.

BELIEF TO CREATE

RelayOps can fit the existing environment, identify a meaningful workflow problem, and support a credible business case.

CORE MESSAGE

Start with one high-impact workflow, expose the handoff risk, and define a measurable improvement path.

INITIATIVES

- Diagnostic landing page and demo journey
- Role-specific proof content
- Sales enablement package
- Content production

RECOMMENDED ASSETS

- Diagnostic landing page
- Buying guide
- ROI assessment
- Connector and governance FAQ
- Sales script and battle card

CHANNELS

- Website landing page
- Email nurture
- LinkedIn
- Sales outreach

CTAS

- Assess your workflow risk
- Request a tailored diagnostic and demo

KPIS

- Conversion tracking quality
- Landing-page conversion baseline
- Asset engagement by supplied persona
- Sales enablement adoption

Activate Qualified Demand

TYPE

Time Period

TIME WINDOW

Days 61–90

OBJECTIVE

Launch targeted content and demand programs that produce qualified diagnostic and demo requests.

PURPOSE

Convert validated problem recognition and proof into sales conversations while learning which audience and message perform best.

BELIEF TO CREATE

A tailored RelayOps diagnostic is a low-friction next step for evaluating a specific operational risk and potential improvement.

CORE MESSAGE

Bring one high-impact cross-system workflow to RelayOps and leave with a clearer view of handoff risk and improvement priorities.

INITIATIVES

Targeted campaign activation   Educational webinar   Email and sales follow-up   Weekly funnel optimization

RECOMMENDED ASSETS

Workflow-risk webinar   Persona-specific ads and email   Product demo   Diagnostic follow-up sequence

CHANNELS

Paid search   LinkedIn   Targeted email   Sales outreach   Webinar

CTAS

Request a tailored workflow diagnostic   Book a product demo

KPIS

Sales-accepted qualified demo requests   Demo-request conversion rate   Qualified opportunity progression

Cost per qualified demo where paid media is used

Timeline

Days 1–30

ORDER

1

FOCUS

ICP, positioning, and measurement validation

PRIMARY GOAL

Define the highest-value ICP, establish differentiated messaging, and pressure-test it with a virtual focus group.

INITIATIVES

ICP and Messaging Validation    Measurement and Optimization

LAUNCH ASSETS

ICP scorecard    Messaging matrix    Focus-group guide    Measurement specification

KPIS

Approved ICP criteria    Findings from all three personas    Approved message hierarchy    Tracking readiness

Days 31–60

ORDER

2

FOCUS

Launch system and content production

PRIMARY GOAL

Build the conversion journey, proof assets, sales enablement, and content foundation.

INITIATIVES

Diagnostic-Led Conversion Path    Proof and Sales Enablement    90-Day Content and Demand Activation

LAUNCH ASSETS

Diagnostic landing page    Buying guide    ROI assessment    Connector FAQ    Explainer video

Sales script and battle card

KPIS

Landing-page readiness    Conversion baseline    Asset completion    Sales enablement adoption

Days 61–90

ORDER

3

FOCUS

Demand activation and pipeline learning

PRIMARY GOAL

Drive and optimize qualified workflow diagnostic and demo requests.

INITIATIVES

90-Day Content and Demand Activation

Diagnostic-Led Conversion Path

Measurement and Optimization

LAUNCH ASSETS

Workflow-risk webinar

Paid search tests

LinkedIn campaign

Email and sales follow-up sequence

Product demo

KPIS

Sales-accepted qualified demo requests

Demo-request conversion rate

Qualified opportunity progression

Cost per qualified demo

90-Day Periods

1-30

THEME

Validate ICP and differentiation

OBJECTIVES

- Define the highest-value ICP.
- Establish differentiated messaging.
- Pressure-test positioning with a virtual focus group.
- Implement conversion measurement.

ACTIONS

Group Name: Research and positioning

Actions: Score fit around US companies with 200–2,000 employees, at least three workflow systems, and visible handoff-risk triggers.

Build role-specific messaging for the three supplied personas.

Conduct a virtual focus group and document resonance, objections, buying criteria, and proof needs.

Assets: ICP scorecard    Messaging matrix    Focus-group guide    Channels: Virtual focus group

Targeted interviews    Email    LinkedIn    Group Name: Measurement

Actions: Define a qualified demo request.    Configure campaign, website, and CRM tracking.

Create the weekly reporting cadence.    Assets: Measurement specification    Channels: Website analytics

CRM    Marketing automation

KPIS

Approved ICP scorecard    Focus-group findings across all three personas    Approved messaging matrix

Operational demo tracking

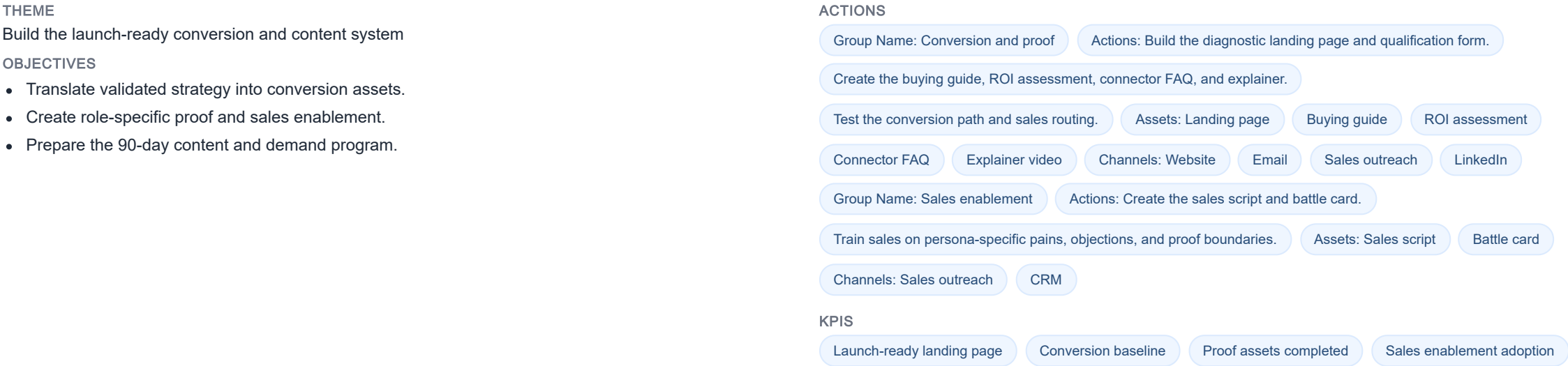
31-60

THEME

Build the launch-ready conversion and content system

OBJECTIVES

- Translate validated strategy into conversion assets.
- Create role-specific proof and sales enablement.
- Prepare the 90-day content and demand program.



61-90

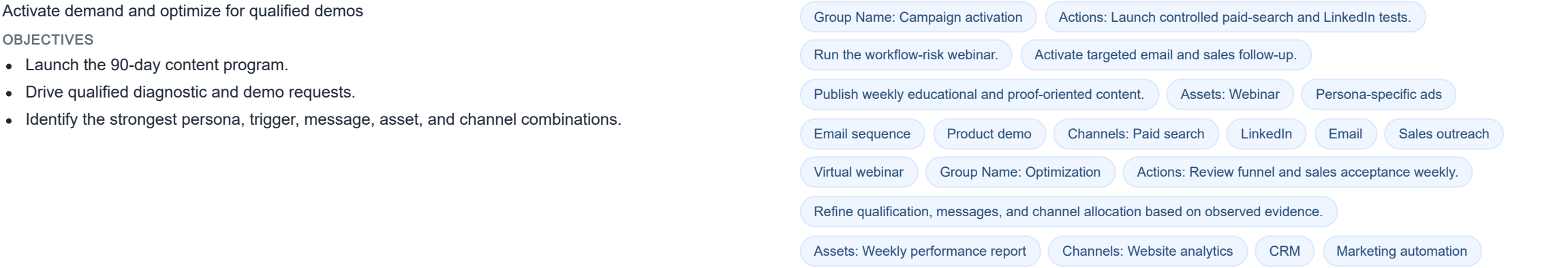
THEME

Activate demand and optimize for qualified demos

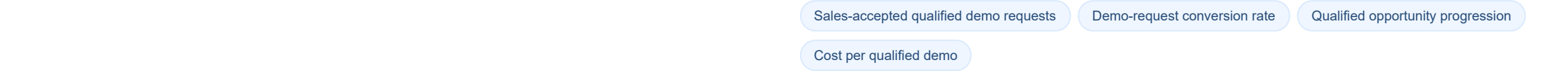
OBJECTIVES

- Launch the 90-day content program.
- Drive qualified diagnostic and demo requests.
- Identify the strongest persona, trigger, message, asset, and channel combinations.

ACTIONS



KPIS



Initiatives

Initiative Plan

ICP and Messaging Validation

TYPE

Audience Research

PRIORITY

critical

GOAL

Approve the ICP, differentiated messaging, objections, proof needs, and qualification criteria.

DESCRIPTION

Define the strongest account fit and validate role-specific positioning through a virtual focus group using only the three supplied personas.

ELEMENTS

Jobs-To-Be-Done hypotheses   Message testing   Objection capture   Buying-trigger validation

ASSETS

Focus-group guide   Messaging matrix   ICP scorecard

CHANNELS

Virtual focus group   Targeted interviews

CTAS

Participate in message validation

KPIS

Representation from all three supplied personas   Documented message and objection findings

Approved ICP scorecard



Diagnostic-Led Conversion Path

TYPE

Conversion

PRIORITY

critical

GOAL

Convert relevant demand into measurable, sales-accepted demo requests.

DESCRIPTION

Build a landing page and qualification journey centered on a tailored workflow diagnostic and demo.

ELEMENTS

ICP qualification questions   Role-specific proof   CRM routing   Conversion tracking

ASSETS

Landing page   Workflow-risk assessment   Demo-request form   Follow-up emails

CHANNELS

Website   Email   Paid search   LinkedIn   Sales outreach

CTAS

Request a tailored workflow diagnostic and demo

KPIS

Qualified demo requests   Landing-page conversion rate   Sales acceptance rate

Proof and Sales Enablement

TYPE

Sales Enablement

PRIORITY

high

GOAL

Support a high-trust, multi-stakeholder evaluation and improve progression from demo to qualified opportunity.

DESCRIPTION

Create role-specific evaluation tools addressing outcomes, integrations, governance, adoption, and objections without unsupported customer claims.

ELEMENTS

- Business-value narrative
- Technical evaluation guidance
- Operational adoption narrative
- Alternative-category contrasts

ASSETS

- ROI assessment
- Buying guide
- Connector FAQ
- Sales script
- Battle card

CHANNELS

- Sales outreach
- Email nurture
- Website

CTAS

- Complete the ROI assessment
- Request a demo

KPIS

- Asset use in sales conversations
- Demo-to-opportunity progression
- Objection frequency by supplied persona

## 90-Day Content and Demand Activation

### TYPE

Content

### PRIORITY

high

### GOAL

Translate validated strategy into a sustained program that drives qualified demo requests.

### DESCRIPTION

Publish and distribute a focused content series that moves buyers from handoff-problem recognition to diagnostic and demo requests.

### ELEMENTS

Problem education   Product explanation   Proof and evaluation   Conversion promotion

### ASSETS

Educational article series   Explainer video   Webinar   Persona-specific email and social content

### CHANNELS

LinkedIn   Email   Website   Paid search   Webinar

### CTAS

Assess your workflow risk   Request a tailored diagnostic and demo

### KPIS

Qualified demo requests influenced by content   Engaged visits   CTA conversion rate  
Qualified response by persona and message

## Measurement and Optimization

### TYPE

Measurement

### PRIORITY

critical

### GOAL

Create reliable evidence for ICP, message, channel, and conversion decisions.

### DESCRIPTION

Establish funnel definitions, attribution, baselines, and a weekly review cadence before campaign activation.

### ELEMENTS

Qualified demo definition   Campaign taxonomy   CRM source capture   Weekly funnel review

### ASSETS

Measurement specification   Campaign tracking plan   Weekly performance report

### CHANNELS

Website analytics   CRM   Marketing automation

### CTAS

Request a demo

### KPIS

Tracking completeness   Lead-to-demo visibility   Sales acceptance data availability

## Content & Assets

### Content & Asset Plan

#### RelayOps ICP and Workflow-Risk Assessment

##### APP CONTENT TYPE

Assessments

##### FUNNEL STAGE

conversion

##### PURPOSE

Qualify fit and turn a visible workflow problem into a tailored diagnostic conversation.

##### CORE MESSAGE

A focused assessment can reveal whether fragmented systems and handoffs create material operational risk.

##### CTA

Request a tailored workflow diagnostic and demo

##### CHANNEL FIT

Website

Email

Sales outreach

LinkedIn

##### DEPENDENCIES

Approved ICP criteria

CRM routing

Reviewed qualification questions

#### The Mid-Market Guide to Cross-System Workflow Intelligence

##### APP CONTENT TYPE

Buying Guides

##### FUNNEL STAGE

consideration

##### PURPOSE

Define evaluation criteria across operational value, integration, governance, and measurable outcomes.

##### CORE MESSAGE

Evaluate workflow intelligence by its ability to connect systems, explain risk, support action, and measure improvement.

##### CTA

Assess your workflow risk

##### CHANNEL FIT

Website

Email nurture

Sales outreach

##### DEPENDENCIES

Validated persona objections

Approved positioning

RelayOps Connector, Governance, and Explainability FAQ

APP CONTENT TYPE

Faqs

FUNNEL STAGE

consideration

PURPOSE

Address technical evaluation and implementation concerns.

CORE MESSAGE

RelayOps is designed as an explainable intelligence layer using supported workflow signals without replacing systems of record.

CTA

Request a technical product demo

CHANNEL FIT

Website   Sales outreach   Email nurture

DEPENDENCIES

Reviewed connector scope   Approved privacy and governance language

Operational Improvement ROI Assessment

APP CONTENT TYPE

Roi Assessments

FUNNEL STAGE

conversion

PURPOSE

Structure a buyer-specific business case without asserting unsupported results.

CORE MESSAGE

Estimate the cost of missed handoffs and define the outcomes a workflow intervention would need to improve.

CTA

Complete the assessment with RelayOps

CHANNEL FIT

Sales outreach   Website   Email nurture

DEPENDENCIES

Transparent assumptions   No fabricated benchmark data

## Diagnose Before You Automate

### APP CONTENT TYPE

Webinars

### FUNNEL STAGE

consideration

### PURPOSE

Educate all three personas on identifying cross-system risk before selecting or expanding automation.

### CORE MESSAGE

Understanding handoffs, ownership, and process risk creates a stronger foundation for practical improvement.

### CTA

Request a tailored workflow diagnostic and demo

### CHANNEL FIT

Virtual event

LinkedIn

Email

Sales outreach

### DEPENDENCIES

Validated messaging

Approved demonstration flow

## How RelayOps Maps Handoffs and Prioritizes Process Risk

### APP CONTENT TYPE

Explainer Videos

### FUNNEL STAGE

consideration

### PURPOSE

Make the differentiated product approach concrete.

### CORE MESSAGE

RelayOps connects supported operational signals, reconstructs handoffs, and turns observed risk into explainable recommendations.

### CTA

Book a product demo

### CHANNEL FIT

Website

LinkedIn

Email

Sales outreach

### DEPENDENCIES

Approved product representation

No unsupported implementation or accuracy claims

# Channels

## Channel Plan

### Website and diagnostic landing page

**ROLE**  
Primary conversion destination and source of product, proof, and qualification information.

**PRIORITY**  
primary

**BEST FOR STAGES**  
Build the Launch System   Activate Qualified Demand

**BEST FOR AUDIENCES**  
• General and Operations Leader for Scaling Business  
• IT and Systems Operations Intelligence Manager  
• Mid-Market Administrative Operations Leader

**RECOMMENDED USES**  
Diagnostic offer   Role-specific proof   Demo qualification   Connector and governance explanation

**KPIS**  
Qualified demo requests   Conversion rate   Form completion rate

**GUARDRAILS**  
Do not launch paid traffic until tracking and routing are tested.   Do not publish unsupported proof claims.

## Targeted email and sales outreach

### ROLE

Reach known-fit accounts, personalize the problem narrative, and progress committee evaluation.

### PRIORITY

primary

### BEST FOR STAGES

Validate ICP and Positioning Build the Launch System Activate Qualified Demand

### BEST FOR AUDIENCES

- General and Operations Leader for Scaling Business
- IT and Systems Operations Intelligence Manager
- Mid-Market Administrative Operations Leader

### RECOMMENDED USES

Focus-group recruitment Trigger-based outreach Asset follow-up Diagnostic invitation

### KPIS

Qualified response rate Meetings booked Sales-accepted demo requests

### GUARDRAILS

Personalize only using verified account and role information.

Avoid broad, high-volume outreach before validating message fit.

## LinkedIn

### ROLE

Distribute problem education, test message resonance, and retarget engaged buyers.

### PRIORITY

secondary

### BEST FOR STAGES

Validate ICP and Positioning Build the Launch System Activate Qualified Demand

### BEST FOR AUDIENCES

- General and Operations Leader for Scaling Business
- IT and Systems Operations Intelligence Manager
- Mid-Market Administrative Operations Leader

### RECOMMENDED USES

Organic thought leadership Persona-specific promotion Focus-group recruitment Retargeting

### KPIS

Qualified engagement Landing-page visits Demo requests influenced

### GUARDRAILS

Optimize toward qualified actions, not impressions alone.

Use role-specific messages rather than one generic campaign.

## Paid search

### ROLE

Capture active research around workflow bottlenecks, process intelligence, and cross-system operational visibility.

### PRIORITY

secondary

### BEST FOR STAGES

Activate Qualified Demand

### BEST FOR AUDIENCES

- General and Operations Leader for Scaling Business
- IT and Systems Operations Intelligence Manager
- Mid-Market Administrative Operations Leader

### RECOMMENDED USES

High-intent problem and category terms

Diagnostic landing-page promotion

Message testing

### KPIS

Qualified demo requests

Conversion rate

Cost per qualified demo

### GUARDRAILS

Begin with controlled tests because no baseline or budget is supplied.

Exclude irrelevant or low-fit traffic using observed query data.

## Virtual webinar and focus group

### ROLE

Validate positioning, educate buyers, surface objections, and create a direct diagnostic pathway.

### PRIORITY

secondary

### BEST FOR STAGES

Validate ICP and Positioning

Activate Qualified Demand

### BEST FOR AUDIENCES

- General and Operations Leader for Scaling Business
- IT and Systems Operations Intelligence Manager
- Mid-Market Administrative Operations Leader

### RECOMMENDED USES

Message validation

Workflow-risk education

Live product explanation

Question and objection capture

### KPIS

Attendance by supplied persona

Engagement

Qualified follow-up requests

### GUARDRAILS

Separate research-oriented focus-group sessions from promotional webinars.

Do not overgeneralize qualitative findings.

## KPIs

### North Star Metrics

- Sales-accepted qualified demo requests
- Qualified opportunities created from the 90-day program

## KPI Groups

| Group                        | KPIs                                                                                                                                                                 |
|------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| ICP and Messaging Validation | Focus-group participation across all three supplied personas<br>Validated pains, triggers, objections, and proof requirements<br>Approved ICP qualification criteria |
| Demand and Conversion        | Qualified demo requests<br>Landing-page conversion rate<br>Sales acceptance rate<br>Demo-to-opportunity progression                                                  |
| Content and Channel          | Qualified engagement by persona<br>CTA conversion by asset<br>Qualified response by channel<br>Cost per qualified demo for paid activity                             |
| Measurement Quality          | Tracking completeness<br>CRM source and campaign capture<br>Sales disposition completeness                                                                           |

Stage KPIs

| Stage                        | Stage ID                     | KPIs                                                                                                                                        |
|------------------------------|------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------|
| Validate ICP and Positioning | Validate ICP and Positioning | Approved ICP scorecard<br>Focus-group findings across all supplied personas<br>Approved messaging matrix<br>Operational conversion tracking |
| Build the Launch System      | Build the Launch System      | Launch-ready landing page<br>Conversion baseline<br>Proof assets completed<br>Sales enablement adoption                                     |
| Activate Qualified Demand    | Activate Qualified Demand    | Sales-accepted qualified demo requests<br>Demo-request conversion rate<br>Qualified opportunity progression<br>Cost per qualified demo      |