

RelayOps GTM Launch — Board Pitch Deck

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PROJECT

NAME
RelayOps GTM Launch

CHANNEL
B2B

REGION
US

DECK TYPE
Board

CREATED
2026-08-05

PRODUCT

BRAND
RelayOps

NAME
RelayOps Workflow Intelligence Platform

DESCRIPTION
RelayOps gives mid-market operations leaders a connected view of how work moves across teams and systems.

CATEGORY
Operations Intelligence Software

TYPE
B2B SaaS

HOW TO USE THIS SLIDE LIBRARY

- This board pitch deck is delivered as a modular slide library built from current GTM materials.
- Keep the slides that fit the presentation; delete, reorder, or combine the rest.
- Alternate audience, positioning, rollout, and targeting lenses are intentionally included.
- Page numbers are omitted so slide order remains flexible.
- The deck is a snapshot; later source-material changes are not reflected automatically.

The GTM Thesis Is Coherent; Launch Readiness Depends on Closing Validation and Governance Gaps

RelayOps is strategically on track with a differentiated Connected Workflow Intelligence position, but it is not yet operationally launch-ready.

The proposed motion is to help leaders see how work moves across teams and systems, identify risk-bearing handoffs, and measure practical improvements. The board's governance focus is whether the required product, proof, measurement, and operating controls are sufficiently validated to move from planning into activation.

- Positioning, ICP hypothesis, audience architecture, and diagnostic-led motion are aligned across completed planning work.
- Priority validation areas include the workflow wedge, connector capabilities, privacy and access safeguards, published proof, and ownership for claims, routing, follow-up, and reporting.
- Formal review gates should determine strategy and resource reallocation as launch evidence accumulates.

Business Objective, Outcome & Goals

BUSINESS ALIGNMENT

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.

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.

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.

Board-Level Ask

AWAITING INPUT

\$XX

Total budget requested

AWAITING INPUT

\$XX

Target revenue contribution

AWAITING INPUT

XX%

Expected ROI

Market Opportunity — TAM / SAM / SOM

A directional market model connects the broad opportunity to the serviceable and realistically reachable wedge.

TAM ADDRESSABLE MARKET	\$1.9B—\$6.9B annual recurring software revenue; approximately 80,000-115,000 U.S. organization accounts	United States, annual recurring subscription revenue at maturity; buyer unit is one 200-2,000-employee B2B organization with cross-functional, customer-facing workflows and sufficient use of RelayOps-supported systems to connect at least three of Slack, Jira, Salesforce, and HubSpot.
SAM SERVICEABLE MARKET	\$0.6B—\$3.1B annual recurring software revenue; approximately 24,000-52,000 U.S. organization accounts	United States, annual recurring subscription revenue; buyer unit is one qualified 200-2,000-employee B2B organization in the initial high-potential demand pool: complex sales-to-service transitions, recurring onboarding, project delivery, regulated or SLA-sensitive operations, and decentralized ownership.
SOM OBTAINABLE MARKET	\$1.4M—\$10.8M annual recurring revenue at the end of a three-year initial U.S. go-to-market period; approximately 60-180 customer accounts	Three-year, U.S.-only initial beachhead; buyer unit is one sales-accepted and deployed organization account within the SAM.

Sources: 2022 SUSB Annual Datasets by Establishment Industry · Customer Platform Pricing | HubSpot.

Market Opportunity — TAM Methodology

TAM — ADDRESSABLE MARKET

TAM

\$1.9B–\$6.9B

annual recurring software revenue; approximately 80,000-115,000 U.S. organization accounts

DEFINITION & BASIS

United States, annual recurring subscription revenue at maturity; buyer unit is one 200-2,000-employee B2B organization with cross-functional, customer-facing workflows and sufficient use of RelayOps-supported systems to connect at least three of Slack, Jira, Salesforce, and HubSpot.

METHOD

Estimated 120,000-145,000 U.S. employer firms in the 200-2,000 employee band, using Census firm-size data for 200-499, 500-999, and a pro-rated portion of the 1,000-2,499 band; multiplied by an estimated 65%-80% B2B, multi-team, multi-system workflow-fit rate = 80,000-115,000 eligible accounts. Multiplied by a \$24,000-\$60,000 indicative annual contract-value proxy = \$1.9B-\$6.9B.

ASSUMPTIONS

- The Census employer-firm base is an appropriate upper-bound denominator, although it includes some organizations outside RelayOps's B2B and workflow-complexity criteria.
- A 65%-80% qualification factor removes organizations that are primarily consumer-facing, operate with too little cross-functional process complexity, lack enough supported systems, or have unsuitable data access.
- The \$24,000-\$60,000 annual contract-value proxy is not a proposed RelayOps price. It brackets public comparable annual subscription spend from \$2,000 per month for HubSpot Data Hub Enterprise to \$4,700 per month for HubSpot Customer Platform Enterprise, before additional seats, usage, services, or discounts.

Sources: 2022 SUSB Annual Datasets by Establishment Industry · Customer Platform Pricing | HubSpot.

Market Opportunity — SAM Methodology

SAM — SERVICEABLE MARKET

SAM

\$0.6B–\$3.1B

annual recurring software revenue; approximately 24,000-52,000 U.S. organization accounts

DEFINITION & BASIS

United States, annual recurring subscription revenue; buyer unit is one qualified 200-2,000-employee B2B organization in the initial high-potential demand pool: complex sales-to-service transitions, recurring onboarding, project delivery, regulated or SLA-sensitive operations, and decentralized ownership.

METHOD

TAM eligible-account range of 80,000-115,000 multiplied by a 30%-45% priority-use-case and vertical concentration factor = 24,000-52,000 SAM accounts. Multiplied by the same \$24,000-\$60,000 indicative annual contract-value proxy = \$0.6B-\$3.1B.

ASSUMPTIONS

- The 30%-45% factor is a planning proxy, not a published market statistic; it concentrates on firms where cross-system handoff visibility, process-risk detection, and improvement measurement are more likely to be urgent.
- Priority demand includes, but is not limited to, B2B software and technology, professional and project-based services, logistics and distribution, manufacturing, financial-services-adjacent operations, and other SLA- or compliance-sensitive teams.
- SAM requires a viable initial integration footprint and excludes firms needing ERP-centered enterprise process mining as their first requirement.

Sources: 2022 SUSB Annual Datasets by Establishment Industry · Customer Platform Pricing | HubSpot.

Market Opportunity — SOM Methodology

SOM — OBTAINABLE MARKET

SOM

\$1.4M–\$10.8M

annual recurring revenue at the end of a three-year initial U.S. go-to-market period; approximately 60-180 customer accounts

DEFINITION & BASIS

Three-year, U.S.-only initial beachhead; buyer unit is one sales-accepted and deployed organization account within the SAM. This is a reachable-revenue planning range, not a forecast of booked revenue.

METHOD

60-180 deployed accounts by the end of year three multiplied by \$24,000-\$60,000 annual recurring contract value = \$1.4M-\$10.8M ARR. This represents approximately 0.1%-0.8% of the 24,000-52,000-account SAM.

ASSUMPTIONS

- A sales-led motion with a 30-90 day consideration cycle can support an initial diagnostic-led land motion, but deployment, security review, data access, and proof creation may extend realized close-to-live time.
- The range assumes a constrained new-entrant GTM organization rather than broad national coverage: roughly 15-35 net deployed accounts in year one, then increasing annual deployment capacity through referenceability, repeatable onboarding, partners, and additional sales/customer-success capacity.
- Sales acceptance, diagnostic completion, demo-to-qualified-opportunity progression, and conversion instrumentation stated in the brief are treated as operating gates, not as validated historical performance.

Sources: Customer Platform Pricing | HubSpot · 2022 SUSB Annual Datasets by Establishment Industry.

Market Opportunity — Methodology & Limitations

- These are planning ranges, not an externally published category-market estimate and not a revenue forecast.
- The largest sensitivities are the actual count of firms running three supported systems, RelayOps's attainable ACV, security/data-integration friction, the share of firms with acute customer-facing handoff risk, and GTM capacity.
- The model explicitly excludes very small firms, single-system organizations, employee-surveillance use cases, organizations whose first requirement is broad ERP-centered process mining, consumer-only buyers, non-U.S. buyers, implementation/services revenue, and expansion revenue.
- Census data are lagged to 2022 and primarily provide a defensible employer-firm population denominator; they do not validate the product's integration-fit rate or purchase propensity.

Market Forces & Demand Drivers

Demand is supported by fragmented operating environments, pressure to improve execution without proportionally increasing headcount, and growing interest in using operational data to guide automation and AI investments.

Adoption will nevertheless depend on RelayOps proving data reliability, privacy safeguards, rapid time to insight, and a credible path from diagnosis to measurable improvement.

Force	Implication
Positive Demand Drivers	Mid-market organizations increasingly execute customer-facing workflows across collaboration, project-management, CRM, and reporting systems.
Operational Efficiency Pressure	Operations and finance leaders need to identify which process problems warrant intervention, not merely generate more activity reports.
AI and Automation Readiness	The expansion of enterprise AI and automation increases the value of reliable process context.
Negative Demand Pressures	Potential buyers may believe they can reproduce the analysis through BI dashboards, CRM reports, Jira analytics, spreadsheets, or periodic process workshops.
Privacy, Security, and Trust	Analysis of collaboration and work activity can trigger employee-monitoring concerns, legal review, and resistance from IT or human resources.
Buying Committee Dynamics	Operations leaders are the likely champions, but IT will evaluate data access and security, finance will test ROI assumptions, and functional leaders will question whether the findings reflect the realities of their workflows.

Emerging Trends & Opportunities

RelayOps can capitalize on the convergence of process intelligence, workplace analytics, work graphs, and AI-assisted recommendations.

The opportunity is not to match the breadth of enterprise incumbents, but to package the most valuable diagnostic and improvement capabilities into a faster, more approachable product for mid-market organizations.

- Mid-Market Process Intelligence: Enterprise process-mining platforms commonly emphasize complex, data-intensive, end-to-end processes.
- Workflow Diagnostic as Entry Offer: The tailored diagnostic can become both the primary conversion asset and a repeatable product-led component of a sales-led motion.
- Closed-Loop Improvement: Many alternatives specialize in one stage of the improvement cycle: mapping, analytics, work management, automation, or consulting.

Emerging Trends & Opportunities — Continued

- **Handoff Risk Scoring:** A proprietary handoff-risk model could become a defensible product asset if it combines multiple observable indicators such as time without ownership, repeated reassignment, mismatched statuses, unresolved dependencies, missing CRM follow-up, excessive escalation, or deviations from a normal workflow path.
- **AI Recommendations with Governance:** AI-generated recommendations are becoming common across analytics and work platforms, so recommendation quality and governance will matter more than the presence of AI itself.
- **Benchmarking and Maturity Models:** Once RelayOps accumulates sufficient consented and normalized data, it could offer anonymized benchmarks by workflow type, company size, or operating model.
- **Ecosystem and Services Opportunity:** Implementation partners, fractional operations leaders, revenue-operations consultants, and systems integrators could use RelayOps diagnostics to identify and validate improvement projects.

Competitive Landscape

RelayOps competes across several adjacent categories rather than against a single exact substitute.

Competitive strategy should distinguish direct feature overlap from the practical alternatives buyers use today, including internal reporting, process workshops, and operational consulting.

Alternative	Type	Relevance	Source
Celonis	direct	Celonis is a major process-intelligence alternative for organizations seeking a cross-system operational view, process analysis, and improvement opportunities. Its enterprise-oriented digital-twin and process-intelligence positioning makes it especially relevant when a buyer expands the requirement beyond a lightweight mid-market deployment.	Celonis Platform Industrialize Enterprise AI
SAP Signavio Process Intelligence	direct	SAP Signavio offers process mining and transformation capabilities across SAP and non-SAP environments. It is a relevant alternative for buyers that want process analysis embedded in a broader process-management, governance, and transformation suite.	SAP Signavio Process Intelligence
Skan AI	direct	Skan positions its platform around process and work intelligence, including process discovery and AI-oriented operational context. It overlaps with RelayOps where customers want to reconstruct how work occurs and identify improvement opportunities from observed work signals.	Context Graph of Work and Agentic AI Platform Skan AI
Microsoft Power Automate Process Mining	adjacent	Microsoft provides process and task mining within the Power Automate ecosystem to discover inefficiencies, visualize process maps, monitor KPIs, and identify automation opportunities. It is especially relevant in Microsoft-standardized accounts where the buyer prefers to extend an existing automation platform.	Overview of process mining and task mining in Power Automate

Competitive Landscape — Continued

Alternative	Type	Relevance	Source
Workato	adjacent	Workato is principally an integration, orchestration, and workflow-automation platform rather than a neutral workflow-diagnosis product. It is relevant because buyers may prioritize connecting and automating processes before, or instead of, investing in a dedicated intelligence layer to decide what should change.	Workato Platform Features and Benefits Workato
Atlassian Jira reporting and dashboards	adjacent	Jira reporting gives teams project- and delivery-level dashboards, reports, and real-time insights within a primary work-management system. It is a practical alternative when a buyer limits the problem to engineering or project work rather than cross-system handoffs involving CRM, collaboration, and service workflows.	Make Data-Driven Decisions with Jira Reports Atlassian
Custom warehouse and BI build, often using Looker	status quo	A data team can combine application data, modeled metrics, dashboards, and alerts to reproduce portions of workflow reporting. This alternative is relevant because it offers flexibility and control, while RelayOps must demonstrate faster time to actionable handoff insight and lower ongoing operational burden.	Looker for Business Intelligence Google Cloud

Target Segments

Primary ICP: United States-based mid-market B2B organizations with approximately 200-2,000 employees, multiple functional teams, material customer-facing handoffs, and meaningful use of at least three supported systems.

High-potential vertical characteristics include complex sales-to-service transitions, recurring customer onboarding, project-based delivery, regulated or SLA-sensitive operations, and decentralized ownership. Priority champions include heads of operations, revenue operations, customer operations, business transformation, and chiefs of staff with an operational mandate. Strong buying signals include repeated escalations, missed SLAs, delayed onboarding, forecast leakage caused by internal dependencies, executive concern about accountability, planned automation initiatives, or an inability to explain cycle-time variance. Poor initial fits include very small organizations with informal workflows, companies operating primarily in one system, buyers seeking individual employee surveillance, and enterprises requiring broad ERP-centered process mining from the outset.

General and Operations Leader for Scaling Business

TARGETING PROFILE

ROLE SUMMARY

Executive operations leader accountable for scalable execution, cross-functional performance, operational risk, and approval of an operations-intelligence investment.

LIKELY OFFERS

- Executive workflow-risk diagnostic
- Operational ROI assessment with transparent assumptions
- Executive product demo
- Buying guide for workflow intelligence
- Cross-functional evaluation plan

INDUSTRIES

- Cross-industry where ICP and systems criteria are verified
- Software and IT services test cohort
- Professional and business services test cohort

MESSAGING ANGLES

- Gain an evidence-based view of operational risk and accountability.
- Focus resources on the workflow problems that matter most.
- See risk, set priorities, and measure progress without replacing existing systems.
- Start with one high-impact workflow and a tailored diagnostic.

BUYING ROLE

- Decision Maker
- Executive Sponsor
- Business Value Approver

AUDIENCE THEMES

- Operational risk before customer impact
- Scaling without coordination failure
- Cross-functional accountability
- Improvement prioritization
- Measurable executive outcomes

COMPANY SIZES

- 201–500 employees
- 501–1,000 employees
- Verified 1,001–2,000 employee accounts

IT and Systems Operations Intelligence Manager

TARGETING PROFILE

ROLE SUMMARY

Manager or senior manager responsible for systems operations, business applications, integrations, data access, governance, and technical feasibility.

LIKELY OFFERS

- Connector and data-flow demonstration
- Technical workflow review
- Architecture and governance FAQ
- Product demonstration using a representative workflow
- Committee diagnostic including IT and operations

INDUSTRIES

- Cross-industry where ICP and systems criteria are verified
- Software and IT services test cohort
- Professional and business services test cohort

MESSAGING ANGLES

- Add explainable workflow intelligence without replacing systems of record.
- Review connector scope, data flow, governance, and alert logic.
- Connect supported workflow signals without creating another manual reporting project.
- Include IT in a tailored diagnostic centered on one representative workflow.

BUYING ROLE

- Technical Evaluator
- Implementation Gatekeeper
- Security And Governance Reviewer

AUDIENCE THEMES

- Connected insight without replacing systems of record
- Connector scope and implementation requirements
- Explainable workflow mapping and alerts
- Data access, privacy, and governance clarity
- Reduced manual data and reporting burden

COMPANY SIZES

- 201–500 employees
- 501–1,000 employees
- Verified 1,001–2,000 employee accounts

Mid-Market Administrative Operations Leader

TARGETING PROFILE

ROLE SUMMARY

Manager or senior manager responsible for administrative and business operations, resource coordination, process reliability, ownership, and everyday workflow execution.

LIKELY OFFERS

- Workflow-risk assessment
- Missed-handoff checklist
- Representative workflow map
- Operational use-case webinar
- Tailored workflow diagnostic
- Product demonstration focused on a recurring bottleneck

INDUSTRIES

- Cross-industry where ICP and systems criteria are verified
- Software and IT services test cohort
- Professional and business services test cohort

MESSAGING ANGLES

- Expose missed handoffs and unclear ownership.
- Reduce manual coordination by seeing how work moves across systems.
- Turn workflow evidence into practical steps for everyday execution.
- Bring one recurring bottleneck to a tailored diagnostic.

BUYING ROLE

- Operational Champion
- Workflow Owner
- Influencer

AUDIENCE THEMES

- Missed handoffs and recurring bottlenecks
- Clear workflow ownership
- Reduced manual follow-up
- Earlier process-risk visibility
- Practical recommendations that teams can implement

COMPANY SIZES

- 201–500 employees
- 501–1,000 employees
- Verified 1,001–2,000 employee accounts

Executive Operational-Risk Sponsors

TARGET FAMILY SUMMARY

PARENT PERSONA

General and Operations Leader for Scaling Business

INTENT SIGNALS

- Operational risk research
- Missed SLA content consumption
- Escalation-management research
- Repeat visits to executive or diagnostic pages

TARGETING SUMMARY

COO, VP Operations, Head of Operations, General Manager, and senior operations titles at qualified US mid-market accounts showing escalation, SLA, customer-impact, or cycle-time risk.

OFFER

Executive process-risk diagnostic

MESSAGE

See where operational risk is building before it becomes a customer or financial problem.

PRIORITY

High

FUNNEL FIT

MOFU BOFU

Executive Improvement-Prioritization Leaders

TARGET FAMILY SUMMARY

PARENT PERSONA

General and Operations Leader for Scaling Business

INTENT SIGNALS

- Operational excellence content engagement
- Workflow analytics searches
- ROI or business-case page visits

TARGETING SUMMARY

Senior operations decision-makers researching operational excellence, process improvement, workflow analytics, or measurable performance improvement.

OFFER

Priority-workflow assessment and executive demo

MESSAGE

Move from operational noise to a clear, evidence-based improvement plan.

PRIORITY

High

FUNNEL FIT

TOFU MOFU BOFU

Connector and Systems-Fragmentation Evaluators

TARGET FAMILY SUMMARY

PARENT PERSONA

IT and Systems Operations Intelligence Manager

INTENT SIGNALS

- Workflow integration searches
- Connector-page visits
- Architecture or product-demo engagement
- Planned automation initiative

TARGETING SUMMARY

IT operations, business systems, enterprise applications, and information systems managers at accounts using at least three supported systems.

OFFER

Connector and data-flow demonstration

MESSAGE

Connect workflow signals across supported systems without replacing the tools teams already use.

PRIORITY

High

FUNNEL FIT

MOFU

BOFU

Governance and Explainability Gatekeepers

TARGET FAMILY SUMMARY

PARENT PERSONA

IT and Systems Operations Intelligence Manager

INTENT SIGNALS

- Governance FAQ visits
- Security or data-handling content engagement
- Technical webinar attendance
- Repeated product-detail visits

TARGETING SUMMARY

Technical evaluators consuming content about data governance, access controls, AI explainability, architecture, and implementation requirements.

OFFER

Technical workflow review and governance FAQ

MESSAGE

Review the data flow, governance approach, and evidence behind workflow alerts before evaluation.

PRIORITY

High

FUNNEL FIT

MOFU

BOFU

Missed-Handoff Workflow Owners

TARGET FAMILY SUMMARY

PARENT PERSONA

Mid-Market Administrative Operations Leader

INTENT SIGNALS

- Workflow handoff searches
- Bottleneck content engagement
- Customer onboarding delay research
- Missed SLA research

TARGETING SUMMARY

Administrative and business operations managers responsible for cross-team workflows, service delivery, onboarding, and recurring coordination problems.

OFFER

Tailored workflow diagnostic

MESSAGE

See where work stalls, clarify ownership, and identify practical steps to keep it moving.

PRIORITY

High

FUNNEL FIT

TOFU MOFU BOFU

Manual-Coordination and Bottleneck Managers

TARGET FAMILY SUMMARY

PARENT PERSONA

Mid-Market Administrative Operations Leader

INTENT SIGNALS

- Operational efficiency searches
- Workflow bottleneck searches
- Checklist or webinar engagement
- Multiple visits to use-case pages

TARGETING SUMMARY

Operations managers experiencing excessive status chasing, spreadsheet tracking, escalation follow-up, or recurring bottlenecks across disconnected tools.

OFFER

Missed-handoff checklist and workflow-risk assessment

MESSAGE

Replace manual investigation with a connected view of recurring workflow problems.

PRIORITY

High

FUNNEL FIT

TOFU

MOFU

Multi-Stakeholder Tier 1 Account Committee

TARGET FAMILY SUMMARY

PARENT PERSONA

General and Operations Leader for Scaling Business

INTENT SIGNALS

- Multiple engaged contacts from one account
- Account-level search or content intent
- Sales activity
- Diagnostic or webinar engagement

TARGETING SUMMARY

Named-account segment requiring concurrent coverage of the executive sponsor plus the selected IT and administrative operations personas.

OFFER

Cross-functional workflow diagnostic and committee demo

MESSAGE

Align operations, IT, and executive stakeholders around one workflow and one proof plan.

PRIORITY

High

FUNNEL FIT

MOFU BOFU

Executive Business-Case Retargeting Pool

TARGET FAMILY SUMMARY

PARENT PERSONA

General and Operations Leader for Scaling Business

INTENT SIGNALS

- Pricing-page visit
- ROI content engagement
- Diagnostic form start
- Repeat site visit
- Open sales opportunity

TARGETING SUMMARY

Qualified executive visitors and named-account stakeholders who consumed pricing, ROI, diagnostic, buying-guide, or executive-demo content.

OFFER

Tailored evaluation plan

MESSAGE

Build a credible investment case around one measurable workflow problem.

PRIORITY

Medium

FUNNEL FIT

BOFU

Strategic Thesis

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.

Positioning, Promise & Primary Message

POSITIONING CORE

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.

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. • 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. • 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. • Tracks interventions and pre/post outcomes, subject to validation.

Validate ICP and Positioning

PHASE 1

OBJECTIVE

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

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.

CTAS

- Join the virtual focus group
- Request a workflow diagnostic

CHANNELS

- Virtual focus group
- Targeted interviews
- LinkedIn
- Email

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

PHASE 2

OBJECTIVE

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

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.

CTAS

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

CHANNELS

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

KPIS

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

Activate Qualified Demand

PHASE 3

OBJECTIVE

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

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.

CTAS

- Request a tailored workflow diagnostic
- Book a product demo

CHANNELS

- Paid search
- LinkedIn
- Targeted email
- Sales outreach
- Webinar

KPIS

- Sales-accepted qualified demo requests
- Demo-request conversion rate
- Qualified opportunity progression
- Cost per qualified demo where paid media is used

First 30 Days

30 / 60 / 90 ROADMAP	
THEME Validate ICP and differentiation	KPIS • Approved ICP scorecard • Focus-group findings across all three personas • Approved messaging matrix • Operational demo tracking

First 30 Days — Continued

30 / 60 / 90 ROADMAP

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

Days 31–60

30 / 60 / 90 ROADMAP

THEME

Build the launch-ready conversion and content system

KPIS

- Launch-ready landing page
- Conversion baseline
- Proof assets completed
- Sales enablement adoption

Days 31–60 — Continued

30 / 60 / 90 ROADMAP

OBJECTIVES

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

ACTIONS

- Group Name: Conversion and proof
- Actions: Build the diagnostic landing page and qualification form.
- Create the buying guide, ROI assessment, connector FAQ, and explainer.
- Test the conversion path and sales routing.
- Assets: Landing page
- Buying guide
- ROI assessment
- Connector FAQ
- Explainer video
- Channels: Website
- Email
- Sales outreach
- LinkedIn
- Group Name: Sales enablement
- Actions: Create the sales script and battle card.
- Train sales on persona-specific pains, objections, and proof boundaries.
- Assets: Sales script
- Battle card
- Channels: Sales outreach
- CRM

Days 61–90

30 / 60 / 90 ROADMAP	
THEME Activate demand and optimize for qualified demos	KPIS - Sales-accepted qualified demo requests - Demo-request conversion rate - Qualified opportunity progression - Cost per qualified demo

Days 61–90 — Continued

30 / 60 / 90 ROADMAP

OBJECTIVES

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

ACTIONS

- Group Name: Campaign activation
- Actions: Launch controlled paid-search and LinkedIn tests.
- Run the workflow-risk webinar.
- Activate targeted email and sales follow-up.
- Publish weekly educational and proof-oriented content.
- Assets: Webinar
- Persona-specific ads
- Email sequence
- Product demo
- Channels: Paid search
- LinkedIn
- Email
- Sales outreach
- Virtual webinar
- Group Name: Optimization
- Actions: Review funnel and sales acceptance weekly.
- Refine qualification, messages, and channel allocation based on observed evidence.
- Assets: Weekly performance report
- Channels: Website analytics
- CRM
- Marketing automation

Website and Diagnostic Landing Page

PRIMARY CHANNEL	
ROLE Primary conversion destination and source of product, proof, and qualification information. BEST FOR AUDIENCES General and Operations Leader for Scaling Business IT and Systems Operations Intelligence Manager Mid-Market Administrative Operations Leader KPIS • Qualified demo requests • Conversion rate • Form completion rate	BEST FOR STAGES Build the Launch System Activate Qualified Demand RECOMMENDED USES • Diagnostic offer • Role-specific proof • Demo qualification • Connector and governance explanation GUARDRAILS • Do not launch paid traffic until tracking and routing are tested. • Do not publish unsupported proof claims.

Targeted Email and Sales Outreach

PRIMARY CHANNEL	
ROLE Reach known-fit accounts, personalize the problem narrative, and progress committee evaluation. BEST FOR AUDIENCES General and Operations Leader for Scaling Business IT and Systems Operations Intelligence Manager Mid-Market Administrative Operations Leader KPIS • Qualified response rate • Meetings booked • Sales-accepted demo requests	BEST FOR STAGES Validate ICP and Positioning Build the Launch System Activate Qualified Demand RECOMMENDED USES • Focus-group recruitment • Trigger-based outreach • Asset follow-up • Diagnostic invitation GUARDRAILS • Personalize only using verified account and role information. • Avoid broad, high-volume outreach before validating message fit.

LinkedIn

SECONDARY CHANNEL

ROLE

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

BEST FOR AUDIENCES

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

KPIS

- Qualified engagement
- Landing-page visits
- Demo requests influenced

BEST FOR STAGES

- Validate ICP and Positioning
- Build the Launch System
- Activate Qualified Demand

RECOMMENDED USES

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

GUARDRAILS

- Optimize toward qualified actions, not impressions alone.
- Use role-specific messages rather than one generic campaign.

Paid Search

SECONDARY CHANNEL

ROLE

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

RECOMMENDED USES

- High-intent problem and category terms
- Diagnostic landing-page promotion
- Message testing

GUARDRAILS

- Begin with controlled tests because no baseline or budget is supplied.
- Exclude irrelevant or low-fit traffic using observed query data.

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

KPIS

- Qualified demo requests
- Conversion rate
- Cost per qualified demo

Virtual Webinar and Focus Group

SECONDARY CHANNEL

ROLE

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

BEST FOR AUDIENCES

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

KPIS

- Attendance by supplied persona
- Engagement
- Qualified follow-up requests

BEST FOR STAGES

- Validate ICP and Positioning
- Activate Qualified Demand

RECOMMENDED USES

- Message validation
- Workflow-risk education
- Live product explanation
- Question and objection capture

GUARDRAILS

- Separate research-oriented focus-group sessions from promotional webinars.
- Do not overgeneralize qualitative findings.

TOFU — Problem Recognition

FUNNEL MAPPING

OBJECTIVE

Help selected-persona audiences recognize that missed handoffs, ownership gaps, and recurring escalations are cross-system workflow problems rather than isolated team failures.

CONTENT / OFFERS

- Missed-handoff checklist
- Workflow-risk explainer
- Educational webinar
- Problem-focused document ad
- Representative workflow-map video

AUDIENCE TYPES

- LinkedIn persona title and function audiences
- Tier 2 named accounts
- Contextual programmatic audiences
- Problem-oriented custom segments
- Narrow X keyword and follower tests

PLATFORMS

- LinkedIn
- Programmatic ABM
- Google YouTube selective tests
- X experimental

MOFU — Solution and Proof Evaluation

FUNNEL MAPPING

OBJECTIVE

Demonstrate how RelayOps maps cross-system handoffs, identifies risk, supports practical interventions, and fits the existing environment.

CONTENT / OFFERS

- Tailored workflow diagnostic
- Use-case demonstration
- Connector and governance FAQ
- Workflow-risk webinar
- Buying guide
- Representative workflow map

AUDIENCE TYPES

- Problem-aware Google Search audiences
- LinkedIn named-account persona audiences
- Website and content retargeting
- Video and document-ad engagers
- Intent-qualified account audiences

PLATFORMS

- Google Ads
- LinkedIn
- Microsoft Advertising
- Programmatic ABM
- Meta retargeting

BOFU — Diagnostic, Committee Alignment, and Demo

FUNNEL MAPPING

OBJECTIVE

Convert qualified accounts into sales-accepted diagnostic and demo requests while supplying each selected persona with the proof needed for a 30–90 day committee evaluation.

CONTENT / OFFERS

- Tailored workflow diagnostic and demo
- Committee demo with operations and IT
- Technical workflow review
- ROI assessment with transparent assumptions
- Role-specific evaluation plan
- Proof-plan consultation

AUDIENCE TYPES

- High-intent exact and phrase Search audiences
- Tier 1 named accounts
- Open-opportunity and sales-engaged account audiences
- Diagnostic form abandoners
- Pricing, ROI, connector, governance, and demo-page visitors
- Multiple engaged stakeholders from one account

PLATFORMS

- Google Search
- LinkedIn
- Programmatic ABM
- Microsoft Advertising
- Google retargeting
- Meta retargeting

Ongoing Cadence

CONTENT TYPE	ASSETS	VOLUME	WEEKS ACTIVE OF 13	CADENCE
Emails · Marketing	23		13	2x per week
Video · Marketing	18		7	1-2x per week
Website · Marketing	15		9	Weekly
Sales · Sales	14		8	Weekly
Ads · Marketing	12		5	Weekly
Blog · Marketing	12		12	Weekly
Other · Marketing	7		5	Every other week

CAC, LTV & Payback Period

AWAITING INPUT

\$XX

CAC

AWAITING INPUT

\$XX

LTV

AWAITING INPUT

XX:1

LTV:CAC

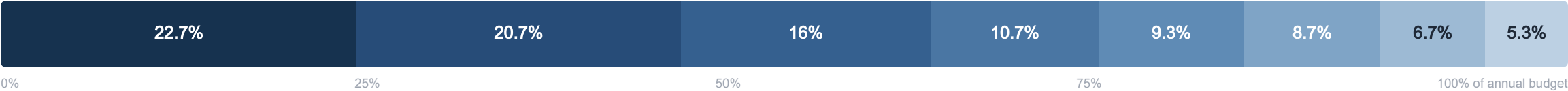
AWAITING INPUT

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Marketing spend payback period

Draft Budget — Allocation

Paid media spend takes the largest share at 22.7%; Content and sales enablement follows at 20.7%.



Paid media spend
\$170,000 HIGH

Measurement, tooling, operations, and compliance
\$80,000 CRITICAL

Virtual events, demonstrations, and proof development
\$50,000 HIGH

Content and sales enablement
\$155,000 CRITICAL

ICP, messaging, and launch strategy validation
\$70,000 CRITICAL

Testing and contingency reserve
\$40,000 MEDIUM

Website, conversion, and SEO implementation
\$120,000 CRITICAL

Paid campaign management and creative
\$65,000 HIGH

Draft Budget — Line Items

Workstream	Line Item	Allocation	% of Workstream	% of Total	Rationale
ICP, messaging, and launch strategy validation	ICP and Jobs-To-Be-Done validation	\$25,000	35.7%	3.3%	Refines qualification criteria for US companies with 200–2,000 employees, cross-system fragmentation, and visible handoff risk.
ICP, messaging, and launch strategy validation	Persona focus groups and messaging validation	\$25,000	35.7%	3.3%	Funds recruitment, facilitation, synthesis, and refinement of existing message anchors across executive, technical, and administrative operations personas.
ICP, messaging, and launch strategy validation	Launch planning, claim governance, and quarterly reviews	\$20,000	28.6%	2.7%	Translates validated findings into campaign briefs, approval rules, qualification standards, and quarterly prioritization decisions.
Website, conversion, and SEO implementation	Information architecture and website copy implementation	\$45,000	37.5%	6%	Implements the homepage, platform positioning, workflow-intelligence answer page, persona pages, trust content, integrations evidence, and ROI methodology narrative.
Website, conversion, and SEO implementation	Landing-page development and diagnostic conversion path	\$45,000	37.5%	6%	Builds tailored diagnostic and demo destinations, forms, routing, thank-you experiences, and campaign-specific landing-page variants.
Website, conversion, and SEO implementation	Technical SEO and answer-engine implementation	\$18,000	15%	2.4%	Supports canonical governance, crawlability, structured content, internal linking, search intent mapping, and answer-first page formatting.

Draft Budget — Line Items — Continued

Workstream	Line Item	Allocation	% of Workstream	% of Total	Rationale
Website, conversion, and SEO implementation	CRO, accessibility QA, and website maintenance	\$12,000	10%	1.6%	Funds form testing, usability corrections, message-to-page alignment checks, accessibility QA, and maintenance after launch.
Content and sales enablement	Editorial and organic-search content production	\$50,000	32.3%	6.7%	Produces answer-first articles covering handoff failure, bottlenecks, workflow baselines, governance, comparisons, and improvement prioritization.
Content and sales enablement	Sales collateral and committee enablement	\$55,000	35.5%	7.3%	Implements diagnostic preparation, evaluation frameworks, ROI worksheets, business-case materials, battlecards, objection responses, and committee comparison assets.
Content and sales enablement	Technical proof and trust content	\$30,000	19.4%	4%	Adapts validated product evidence into connector, governance, data-flow, explainability, privacy, and technical-evaluation materials without asserting unsupported capabilities.
Content and sales enablement	Content design, repurposing, and maintenance	\$20,000	12.9%	2.7%	Supports the medium-effort cadence through templates, design, persona adaptation, version control, refreshes, and reuse of major assets across multiple calendar instances.
Paid media spend	Google high-intent Search media	\$100,000	58.8%	13.3%	Prioritizes exact- and phrase-match problem, category, and evaluation intent related to broken handoffs, workflow risk, process intelligence, and cross-system operations visibility.

Draft Budget — Line Items — Continued

Workstream	Line Item	Allocation	% of Workstream	% of Total	Rationale
Paid media spend	LinkedIn persona and account targeting media	\$55,000	32.4%	7.3%	Targets approved executive operations, IT and systems operations, and administrative operations roles at qualified US mid-market accounts.
Paid media spend	Multi-stakeholder retargeting media	\$15,000	8.8%	2%	Re-engages qualified site visitors and proof-seeking committee members with governance, ROI, diagnostic, and objection-handling messages.
Paid campaign management and creative	Campaign architecture, management, and optimization	\$30,000	46.2%	4%	Covers setup, keyword and audience controls, exclusions, pacing, search-term review, reporting, and optimization toward qualified diagnostic and demo outcomes.
Paid campaign management and creative	Paid creative production and message testing	\$35,000	53.8%	4.7%	Produces search copy, LinkedIn units, retargeting variants, and persona-specific proof messages aligned with the 22 planned ad instances and subsequent optimization cycles.
Virtual events, demonstrations, and proof development	Workflow-risk webinars and virtual programs	\$25,000	50%	3.3%	Funds planning, speakers, promotion support, production, moderation, follow-up, and repurposing for diagnostic-led educational sessions.
Virtual events, demonstrations, and proof development	Persona-specific workflow teardowns and demo programs	\$15,000	30%	2%	Operationalizes executive, technical, and administrative demonstrations around handoff risk, ownership, governance, and improvement prioritization.

Draft Budget — Line Items — Continued

Workstream	Line Item	Allocation	% of Workstream	% of Total	Rationale
Virtual events, demonstrations, and proof development	Referenceable proof and pilot-evidence development	\$10,000	20%	1.3%	Creates approved frameworks for capturing pilot baselines, outcome evidence, quotes, and proof artifacts when substantiated evidence becomes available.
Measurement, tooling, operations, and compliance	Analytics and conversion-tracking implementation	\$25,000	31.2%	3.3%	Implements event definitions, form and CTA tracking, campaign taxonomy, diagnostic funnel visibility, and tracking validation.
Measurement, tooling, operations, and compliance	Marketing and reporting tools	\$25,000	31.2%	3.3%	Provides a controlled allowance for analytics, SEO research, webinar, content workflow, testing, and dashboard capabilities, subject to existing-stack review.
Measurement, tooling, operations, and compliance	CRM operations, lead routing, and reporting	\$20,000	25%	2.7%	Supports source capture, qualification fields, routing, sales disposition, dashboarding, and closed-loop feedback on demo quality.
Measurement, tooling, operations, and compliance	Privacy, compliance, claim review, and campaign QA	\$10,000	12.5%	1.3%	Funds consent, data-use, accessibility, brand, claim-substantiation, targeting, and launch-readiness checks appropriate to US B2B execution.
Testing and contingency reserve	Validated media test reserve	\$15,000	37.5%	2%	Can be released to proven search themes, persona segments, or retargeting audiences after lead-quality and tracking gates are met.

Draft Budget — Line Items — Continued

Workstream	Line Item	Allocation	% of Workstream	% of Total	Rationale
Testing and contingency reserve	Production and technical contingency	\$15,000	37.5%	2%	Covers unplanned development, integration, content correction, accessibility, or tracking remediation discovered during implementation.
Testing and contingency reserve	Proof, legal, and claim-substantiation reserve	\$10,000	25%	1.3%	Provides capacity for evidence review or specialist support when technical, privacy, security, or outcome claims require additional substantiation.

Draft Budget — Workstreams

Workstream	Allocation	% of Total	Priority	Purpose	Planning Rationale
ICP, messaging, and launch strategy validation	\$70,000	9.3%	critical	Refine and validate the existing ICP, messaging matrix, claims, qualification logic, and launch decisions before scaling execution.	RelayOps has a defined roadmap and three supplied personas, but market language, objections, proof requirements, and prioritization still need real-world validation and operational approval.
Website, conversion, and SEO implementation	\$120,000	16%	critical	Implement the diagnostic-led website journey, category education, persona destinations, trust content, and conversion infrastructure.	Paid activation depends on approved canonical URLs, role-specific pages, technical evidence, clear CTAs, reliable forms, CRM routing, and measurable diagnostic and demo paths.
Content and sales enablement	\$155,000	20.7%	critical	Produce and maintain the educational, proof-oriented, persona-specific, and sales-assisted assets required by the approved calendar and buying journey.	A committee-based SaaS sale requires coordinated content for category comprehension, technical confidence, operational value, objection handling, and diagnostic follow-up.
Paid media spend	\$170,000	22.7%	high	Capture validated high-intent demand and re-engage qualified buying-committee members after conversion and measurement readiness.	The mix follows the supplied targeting guidance: search leads demand capture, LinkedIn addresses role-specific audiences, and retargeting reinforces proof across committee members. Media spend is separate from management, creative, and analytics.
Paid campaign management and creative	\$65,000	8.7%	high	Operate paid campaigns, enforce targeting quality, and produce testable persona- and funnel-specific creative independently from media spend.	A controlled launch requires keyword governance, exclusions, audience QA, budget pacing, creative iteration, landing-page alignment, and qualified-lead optimization.

Draft Budget — Workstreams — Continued

Workstream	Allocation	% of Total	Priority	Purpose	Planning Rationale
Virtual events, demonstrations, and proof development	\$50,000	6.7%	high	Create credible interaction points that demonstrate workflow-risk diagnosis, technical fit, and measurable operational value.	The approved calendar includes virtual focus-group, workflow-teardown, webinar, and demo activity. These formats support committee education and produce qualitative evidence for message and sales-process refinement.
Measurement, tooling, operations, and compliance	\$80,000	10.7%	critical	Establish reliable attribution, CRM capture, reporting, workflow management, quality assurance, and responsible campaign operations.	RelayOps needs baseline funnel data and complete source, campaign, and sales-disposition capture before media performance or acquisition economics can be interpreted.
Testing and contingency reserve	\$40,000	5.3%	medium	Preserve flexibility for validated opportunities, implementation corrections, proof requirements, and controlled experiments without disrupting core execution.	Because baseline performance and implementation complexity are not yet known, a visible reserve is more responsible than prematurely assigning all funds to channels.

Sales-accepted qualified demo requests

PRIMARY GOAL METRIC

North Star Metrics

- Sales-accepted workflow diagnostic and demo requests from qualified target accounts.
- Diagnostic-to-demo and demo-to-opportunity progression after CRM stage definitions are operational.
- Buying-committee engagement with operations, technical trust, integration, executive value, and ROI methodology content.
- Content-influenced qualified pipeline using an approved attribution model.

KPI Groups

Group	KPIs
Audience and message validation	• Validation sessions completed across the supplied personas. • Repeated problem-language patterns documented. • Role-specific objections and proof needs confirmed. • Diagnostic triggers and disqualification signals approved. • Message revisions resulting from structured feedback.
Awareness and discoverability	• Qualified organic sessions. • Search impressions and clicks for workflow-intelligence and cross-system handoff topics. • Engaged visits to category and answer pages. • Target-account LinkedIn engagement. • Checklist starts and completions. • Assisted diagnostic requests.
Interest and consideration	• Platform and use-case page engagement. • Return-visitor rate. • Integration-page engagement. • Technical and operations guide usage. • ROI methodology interactions. • Multi-page and multi-role engagement within target accounts. • Progression to evaluation or diagnostic content.

KPI Groups — Continued

Group	KPIs
Evaluation and trust	• Trust-center and security-content engagement. • Evaluation scorecard usage. • Technical-review progression. • Stakeholder participation in diagnostic planning. • Documented objection resolution. • Evaluation-to-booking progression.
Conversion and sales handoff	• Qualified diagnostic and demo requests. • Sales-accepted request rate. • Landing-page conversion rate. • Form completion rate. • Booking rate. • Attendance rate. • Lead-routing success. • Median sales follow-up time. • Diagnostic-to-demo progression. • Opportunity creation after stage definitions are approved.

KPI Groups — Continued

Group	KPIs
Paid channel quality	• Qualified conversion rate by channel and message. • Sales-accepted request rate by channel. • Search-term relevance. • Target-account engagement. • Buying-committee role coverage. • Cost per sales-accepted request. • Frequency and audience saturation. • Landing-page quality by intent segment.
Content operations and governance	• Priority assets completed on schedule. • Percentage of high-risk claims with approved evidence. • Percentage of governed pages with owners and last-validated dates. • Review turnaround time. • Broken-link, schema, canonical, form, and tracking QA pass rate. • Sales usage of enablement assets. • Content refreshes triggered by product or policy changes.

KPI Groups — Continued

Group	KPIs
Retention foundation	• Onboarding-template completion. • Workflow baseline documentation. • Action ownership recorded. • Workflow review participation. • Executive report delivery. • Additional qualified workflows identified. • Customer evidence requests completed with approval.

Board Actions & Vote Request

#	Action or vote	Owner	Timing / status
1			
2			
3			
4			
5			