

# RelayOps GTM Launch — Client Pitch Deck

A modular, source-backed pitch deck: select and reorder the audience-ready slides you need.

## PROJECT

NAME  
RelayOps GTM Launch

CHANNEL  
B2B

REGION  
US

DECK TYPE  
Client

CREATED  
2026-08-10

## 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 client 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.

# A Diagnostic-Led GTM System Can Turn Connected Workflow Intelligence into a Launch-Ready Position

The recommended direction is to position RelayOps as a neutral, connected workflow intelligence layer that helps mid-market leaders identify execution risk across teams and systems and guide measurable improvement.

The strategic foundation is coherent: the ICP hypothesis, audience architecture, differentiated positioning, and diagnostic-led motion are aligned. The engagement now translates that foundation into validated messaging, conversion and proof assets, sales enablement, and a 90-day content program designed to drive qualified demo requests.

- Focus the value narrative on how work moves across collaboration, project-management, and CRM systems—not on any one system alone.
- Lead with automated handoff mapping, prioritized risk detection, explainable recommendations, and outcome tracking.
- Pressure-test positioning with the supplied personas before activation and establish conversion measurement as part of launch readiness.
- Treat the work as strategically on track while closing the operational requirements for launch readiness.

# 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          |

# Audience — General and Operations Leader for Scaling Business

TARGET SEGMENTS

GROUP

Primary

PRIORITY

Primary

PAIN POINTS

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

BUYING ROLE

Executive operational sponsor and business-value approver

NEEDS

Cross-functional visibility

Operational accountability

Prioritized improvements

Executive-level outcome reporting

# Audience — IT and Systems Operations Intelligence Manager

TARGET SEGMENTS

GROUP

Primary

PRIORITY

Primary

PAIN POINTS

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

BUYING ROLE

Technical evaluator and implementation gatekeeper

NEEDS

Clear connector and data-scope details

Explainable analysis

Governance and privacy clarity

Compatibility with the existing tool environment

# Audience — Mid-Market Administrative Operations Leader

TARGET SEGMENTS

GROUP

Primary

PRIORITY

Primary

PAIN POINTS

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

BUYING ROLE

Operational champion and day-to-day workflow owner

NEEDS

Clear handoff ownership

Earlier process-risk visibility

Practical recommendations

Reliable operating structure

# 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

# 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.                |

# 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

# 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.

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.

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.

# Positioning & Market Problem

## POSITIONING

### 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.

### 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

### 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.

# Messaging Pillars

| Pillar                   | Message                                                                                                      | Supporting Points                                                                                                                                                            |
|--------------------------|--------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Connected visibility     | See how work moves across teams and systems instead of analyzing each tool in isolation.                     | <ul style="list-style-type: none"><li>• Connects supported Slack, Jira, Salesforce, and HubSpot signals.</li><li>• Maps handoffs and highlights unclear ownership.</li></ul> |
| Practical risk detection | Find stalled work and recurring bottlenecks before they affect customers or commitments.                     | <ul style="list-style-type: none"><li>• Prioritizes process-risk alerts.</li><li>• Connects recommendations to observed workflow evidence.</li></ul>                         |
| Measurable improvement   | Focus teams on changes that can shorten cycle time, improve accountability, and demonstrate operational ROI. | <ul style="list-style-type: none"><li>• Supports executive reporting.</li><li>• Tracks interventions and pre/post outcomes, subject to validation.</li></ul>                 |

# Messaging Guardrails

## MESSAGE GUARDRAILS

### 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.

# Brand Voice

## BRAND VOICE

- Direct, practical, and operationally literate.
- Clear about what is known, assumed, illustrative, or still being validated.
- Confident without exaggeration or category jargon overload.
- Respectful of existing systems, internal expertise, governance, and organizational hierarchy.
- Focused on accountable improvement rather than surveillance or blame.
- Specific about next steps, owners, inputs, and decision criteria.
- Proof-oriented, transparent, and suitable for high-trust committee review.

# Website and Diagnostic Landing Page

| PRIMARY CHANNEL                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <div><b>ROLE</b><br/>Primary conversion destination and source of product, proof, and qualification information.</div> <div><b>BEST FOR AUDIENCES</b><div><div>General and Operations Leader for Scaling Business</div><div>IT and Systems Operations Intelligence Manager</div><div>Mid-Market Administrative Operations Leader</div></div></div> <div><b>KPIS</b><ul style="list-style-type: none"><li>• Qualified demo requests</li><li>• Conversion rate</li><li>• Form completion rate</li></ul></div> | <div><b>BEST FOR STAGES</b><div><div>Build the Launch System</div><div>Activate Qualified Demand</div></div></div> <div><b>RECOMMENDED USES</b><ul style="list-style-type: none"><li>• Diagnostic offer</li><li>• Role-specific proof</li><li>• Demo qualification</li><li>• Connector and governance explanation</li></ul></div> <div><b>GUARDRAILS</b><ul style="list-style-type: none"><li>• Do not launch paid traffic until tracking and routing are tested.</li><li>• Do not publish unsupported proof claims.</li></ul></div> |

# Targeted Email and Sales Outreach

| PRIMARY CHANNEL                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <div><p><b>ROLE</b></p><p>Reach known-fit accounts, personalize the problem narrative, and progress committee evaluation.</p><p><b>BEST FOR AUDIENCES</b></p><div><div>General and Operations Leader for Scaling Business</div><div>IT and Systems Operations Intelligence Manager</div><div>Mid-Market Administrative Operations Leader</div></div><p><b>KPIS</b></p><ul style="list-style-type: none"><li>• Qualified response rate</li><li>• Meetings booked</li><li>• Sales-accepted demo requests</li></ul></div> | <div><p><b>BEST FOR STAGES</b></p><div><div>Validate ICP and Positioning</div><div>Build the Launch System</div><div>Activate Qualified Demand</div></div><p><b>RECOMMENDED USES</b></p><ul style="list-style-type: none"><li>• Focus-group recruitment</li><li>• Trigger-based outreach</li><li>• Asset follow-up</li><li>• Diagnostic invitation</li></ul><p><b>GUARDRAILS</b></p><ul style="list-style-type: none"><li>• Personalize only using verified account and role information.</li><li>• Avoid broad, high-volume outreach before validating message fit.</li></ul></div> |

# 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.

# Funnel Execution — Awareness



**STAGE GOAL**

Create recognition that broken cross-system handoffs are an operational problem worthy of investigation.

**ASSETS**

- Workflow intelligence definition page because it gives the new approach a clear, searchable explanation.
- Cross-system handoff visibility answer page because it maps an urgent problem to the category without forcing a product pitch.
- Broken handoff diagnostic checklist because it turns abstract pain into observable signals.
- Weekly LinkedIn problem-recognition derivatives because they support rapid language validation with the named personas.

**AUDIENCE MINDSET**

The buyer sees delays, status chasing, ownership gaps, or recurring misses but may not have named the underlying cross-system issue.

**CORE MESSAGE**

Hidden handoffs between teams and tools can create risk that isolated dashboards and reports do not reveal.

**CTA**

Assess your workflow handoff risk.

**CHANNELS**

- Website and organic search.
- LinkedIn organic.
- Google Search and LinkedIn paid after readiness gates pass.

**KPIS**

- Qualified reach, engaged visits, checklist completions, target-account engagement, and assisted diagnostic requests.

# Funnel Execution — Interest



**STAGE GOAL**

Explain the RelayOps approach and establish differentiation from another dashboard or replacement system.

**ASSETS**

- Platform overview page because it anchors the product narrative.
- How RelayOps works explainer because it makes the new approach concrete.
- Role-specific use-case pages because operations, IT, and administrative operations require different relevance cues.
- Illustrative handoff map because it demonstrates the concept without implying an unverified customer result.

**AUDIENCE MINDSET**

The buyer accepts the problem and is exploring how a cross-system workflow-intelligence layer could help.

**CORE MESSAGE**

RelayOps connects signals from existing collaboration, project-management, and CRM systems to reveal how work moves and where attention is needed.

**CTA**

See how RelayOps maps a cross-system workflow.

**CHANNELS**

- Website.
- Organic search.
- LinkedIn.
- Retargeting.
- Sales email.

**KPIS**

- Platform engagement, return visits, role-page engagement, nurture progression, and visits to consideration content.

# Funnel Execution — Consideration



**STAGE GOAL**

Give each buying-committee participant enough relevant information to assess organizational and technical fit.

**ASSETS**

- Integration pages because technical fit is a core buying question.
- IT technical evaluation guide because IT needs system boundaries, permissions, and implementation clarity.
- Operations evaluation guide because the operational sponsor needs actionability and accountability.
- Executive brief because leadership needs prioritization and a defensible value narrative.
- ROI methodology page because the committee needs a transparent model rather than an unsupported savings claim.

**AUDIENCE MINDSET**

The buyer needs to compare approaches and determine whether RelayOps can fit the existing environment and improvement process.

**CORE MESSAGE**

RelayOps is intended to complement existing systems while giving operations, IT, and leadership a shared basis for investigating workflow issues.

**CTA**

Build your workflow evaluation brief.

**CHANNELS**

- Website.
- Organic search.
- LinkedIn and retargeting.
- Sales email and discovery follow-up.

**KPIS**

- Integration-page engagement, guide usage, multi-stakeholder sessions, sales content usage, and progression to diagnostic planning.

# Funnel Execution — Evaluation



**STAGE GOAL**

Resolve technical, trust, implementation, and business-case objections and define a responsible proof plan.

**ASSETS**

- Trust center because security and privacy evidence must be centrally accessible.
- Technical architecture and data-flow overview because IT needs reviewable implementation detail.
- Buying-committee scorecard because multiple stakeholders need shared criteria.
- Diagnostic sample output because buyers need to understand the expected deliverable.
- Proof-plan template because it turns interest into a governed evaluation.

**AUDIENCE MINDSET**

The committee is willing to engage but requires verified details and clear evaluation criteria.

**CORE MESSAGE**

Evaluate RelayOps through a documented workflow, transparent technical boundaries, agreed measures, and explicit assumptions.

**CTA**

Plan a tailored workflow diagnostic.

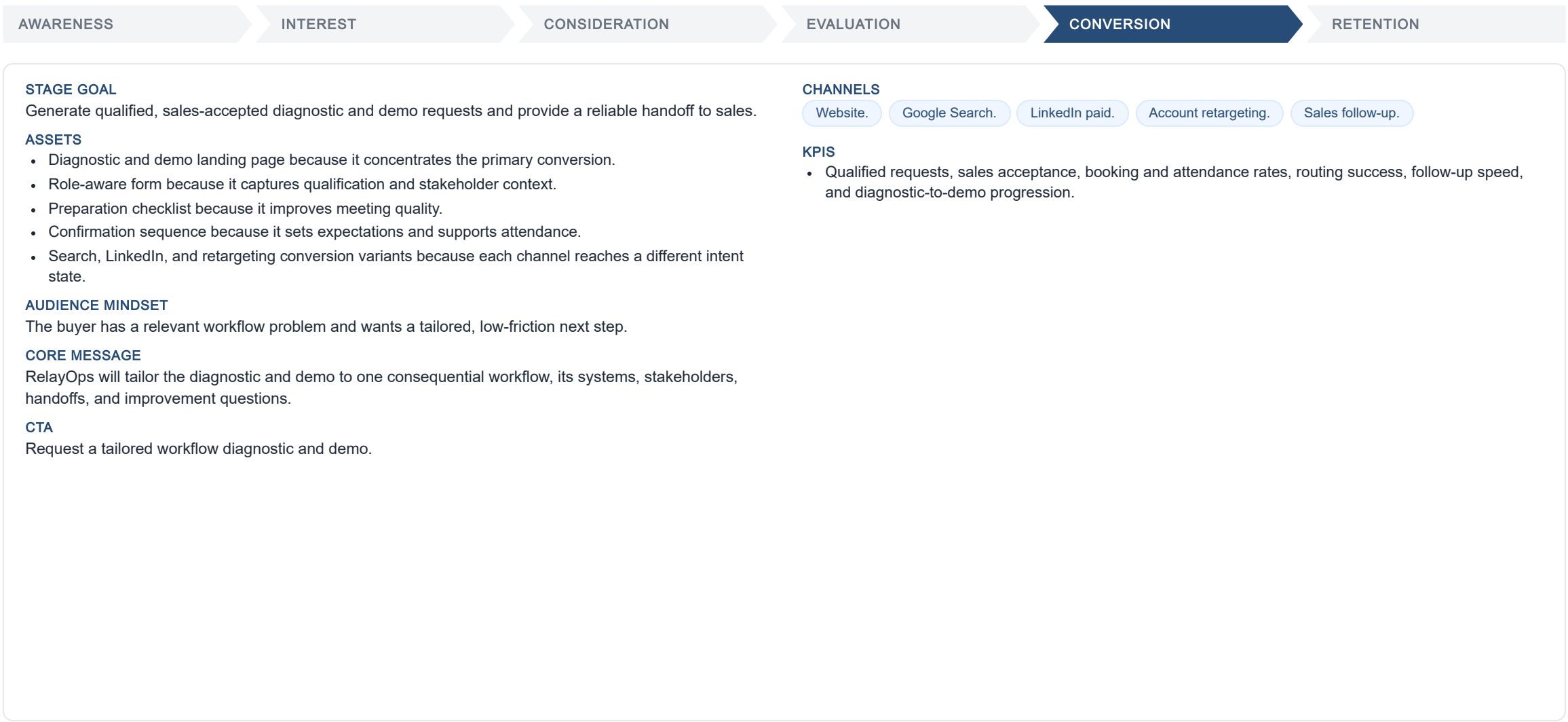
**CHANNELS**

- Website.
- Sales meetings and email.
- Account retargeting.
- Approved sales content repository.

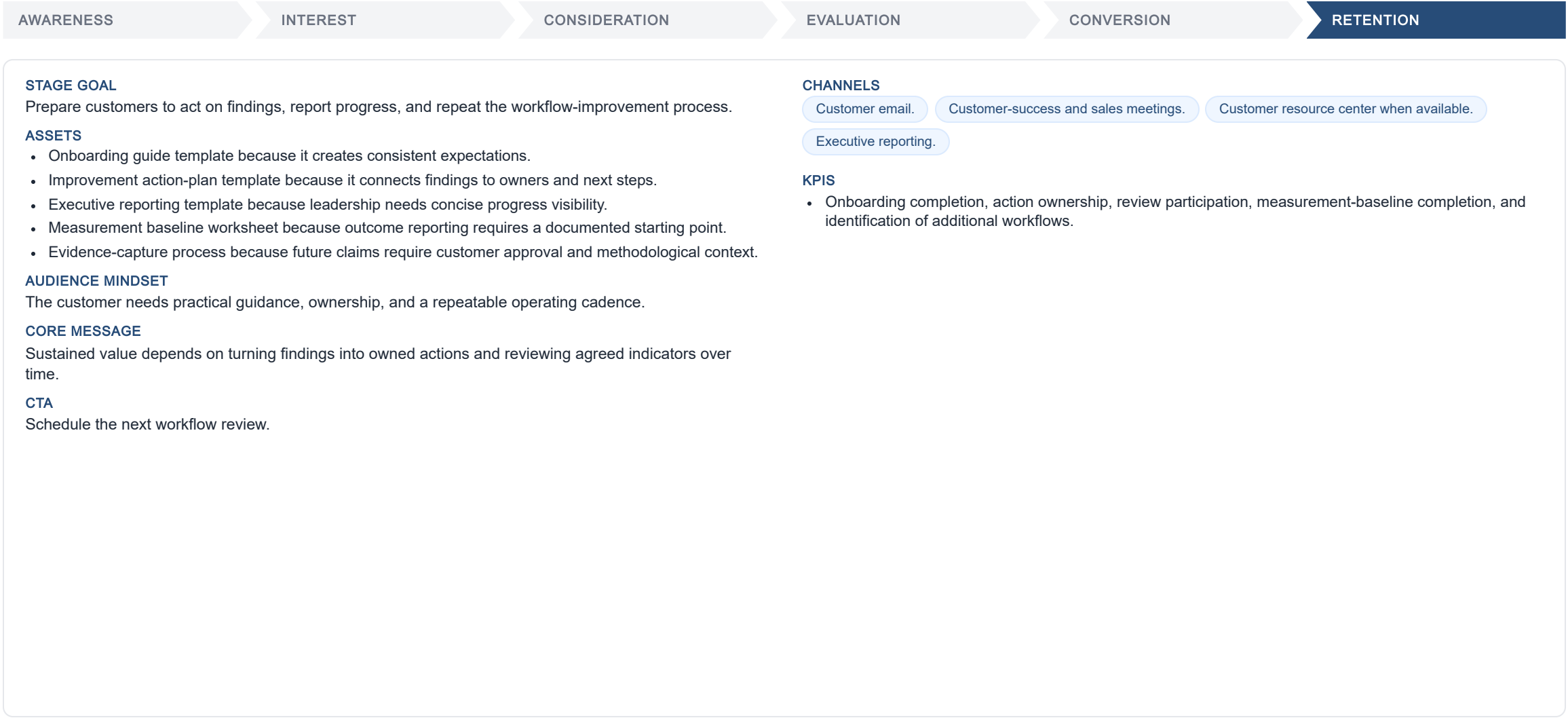
**KPIS**

- Technical-review progression, stakeholder participation, diagnostic acceptance, objection resolution, and movement to a booked meeting.

# Funnel Execution — Conversion



# Funnel Execution — Retention



# 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

# 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                                         |                                                                                                                                                                                                                                      |
|--------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <div>THEME</div> <div>Validate ICP and differentiation</div> | <div>KPIS</div> <div><ul style="list-style-type: none"><li>• Approved ICP scorecard</li><li>• Focus-group findings across all three personas</li><li>• Approved messaging matrix</li><li>• Operational demo tracking</li></ul></div> |

# 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                                                                       |                                                                                                                                                                                                             |
|--------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <div><div>THEME</div><div>Build the launch-ready conversion and content system</div></div> | <div><div>KPIS</div><div><ul style="list-style-type: none"><li>Launch-ready landing page</li><li>Conversion baseline</li><li>Proof assets completed</li><li>Sales enablement adoption</li></ul></div></div> |

# 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

# Rolling 90-Day Calendar

## 90-Day Content Calendar

| Plan detail | Value      |
|-------------|------------|
| Start       | 2026-07-30 |
| End         | 2026-10-28 |
| Weeks       | 13         |

# 90-Day Plan at a Glance

| Week    | Theme                                                                         | Focus         | Assets                    |
|---------|-------------------------------------------------------------------------------|---------------|---------------------------|
| Week 1  | Name the category and validate the highest-value problem language             | Awareness     | 8 <div><div></div></div>  |
| Week 2  | Expose invisible handoffs and observable workflow-risk signals                | Awareness     | 7 <div><div></div></div>  |
| Week 3  | Differentiate workflow intelligence from another dashboard                    | Awareness     | 7 <div><div></div></div>  |
| Week 4  | Show the operational cost of unclear ownership without unsupported benchmarks | Awareness     | 8 <div><div></div></div>  |
| Week 5  | Explain how RelayOps works and establish the executive use case               | Interest      | 7 <div><div></div></div>  |
| Week 6  | Establish operational and technical fit                                       | Consideration | 7 <div><div></div></div>  |
| Week 7  | Build the technical trust foundation                                          | Evaluation    | 7 <div><div></div></div>  |
| Week 8  | Complete and QA the diagnostic-to-demo conversion system                      | Conversion    | 7 <div><div></div></div>  |
| Week 9  | Activate controlled high-intent demand                                        | Conversion    | 9 <div><div></div></div>  |
| Week 10 | Demonstrate the product and clarify evaluation alternatives                   | Consideration | 8 <div><div></div></div>  |
| Week 11 | Build a transparent operational business case                                 | Evaluation    | 8 <div><div></div></div>  |
| Week 12 | Define a responsible committee proof plan                                     | Evaluation    | 8 <div><div></div></div>  |
| Week 13 | Optimize qualified demand and establish reusable adoption evidence            | Retention     | 10 <div><div></div></div> |

# Ongoing Cadence

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

# Sales-accepted qualified demo requests

PRIMARY GOAL METRIC

# KPI Groups

| Group                           | KPIs                                                                                                                                                                                                                                                                                                                                                                                     |
|---------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Audience and message validation | <ul style="list-style-type: none"><li>• Validation sessions completed across the supplied personas.</li><li>• Repeated problem-language patterns documented.</li><li>• Role-specific objections and proof needs confirmed.</li><li>• Diagnostic triggers and disqualification signals approved.</li><li>• Message revisions resulting from structured feedback.</li></ul>                |
| Awareness and discoverability   | <ul style="list-style-type: none"><li>• Qualified organic sessions.</li><li>• Search impressions and clicks for workflow-intelligence and cross-system handoff topics.</li><li>• Engaged visits to category and answer pages.</li><li>• Target-account LinkedIn engagement.</li><li>• Checklist starts and completions.</li><li>• Assisted diagnostic requests.</li></ul>                |
| Interest and consideration      | <ul style="list-style-type: none"><li>• Platform and use-case page engagement.</li><li>• Return-visitor rate.</li><li>• Integration-page engagement.</li><li>• Technical and operations guide usage.</li><li>• ROI methodology interactions.</li><li>• Multi-page and multi-role engagement within target accounts.</li><li>• Progression to evaluation or diagnostic content.</li></ul> |

# KPI Groups — Continued

| Group                        | KPIs                                                                                                                                                                                                                                                                                                                                                                                                                                              |
|------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Evaluation and trust         | <ul style="list-style-type: none"><li>• Trust-center and security-content engagement.</li><li>• Evaluation scorecard usage.</li><li>• Technical-review progression.</li><li>• Stakeholder participation in diagnostic planning.</li><li>• Documented objection resolution.</li><li>• Evaluation-to-booking progression.</li></ul>                                                                                                                 |
| Conversion and sales handoff | <ul style="list-style-type: none"><li>• Qualified diagnostic and demo requests.</li><li>• Sales-accepted request rate.</li><li>• Landing-page conversion rate.</li><li>• Form completion rate.</li><li>• Booking rate.</li><li>• Attendance rate.</li><li>• Lead-routing success.</li><li>• Median sales follow-up time.</li><li>• Diagnostic-to-demo progression.</li><li>• Opportunity creation after stage definitions are approved.</li></ul> |

# KPI Groups — Continued

| Group                             | KPIs                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
|-----------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Paid channel quality              | <ul style="list-style-type: none"><li>• Qualified conversion rate by channel and message.</li><li>• Sales-accepted request rate by channel.</li><li>• Search-term relevance.</li><li>• Target-account engagement.</li><li>• Buying-committee role coverage.</li><li>• Cost per sales-accepted request.</li><li>• Frequency and audience saturation.</li><li>• Landing-page quality by intent segment.</li></ul>                                                     |
| Content operations and governance | <ul style="list-style-type: none"><li>• Priority assets completed on schedule.</li><li>• Percentage of high-risk claims with approved evidence.</li><li>• Percentage of governed pages with owners and last-validated dates.</li><li>• Review turnaround time.</li><li>• Broken-link, schema, canonical, form, and tracking QA pass rate.</li><li>• Sales usage of enablement assets.</li><li>• Content refreshes triggered by product or policy changes.</li></ul> |

# KPI Groups — Continued

| Group                | KPIs                                                                                                                                                                                                                                                                                                                                                               |
|----------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Retention foundation | <ul style="list-style-type: none"><li>• Onboarding-template completion.</li><li>• Workflow baseline documentation.</li><li>• Action ownership recorded.</li><li>• Workflow review participation.</li><li>• Executive report delivery.</li><li>• Additional qualified workflows identified.</li><li>• Customer evidence requests completed with approval.</li></ul> |

# Next Steps

| # | Next step | Owner | Timing / status |
|---|-----------|-------|-----------------|
| 1 |           |       |                 |
| 2 |           |       |                 |
| 3 |           |       |                 |
| 4 |           |       |                 |
| 5 |           |       |                 |