

RelayOps GTM Launch — Investor Pitch Deck

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PROJECT

NAME
RelayOps GTM Launch

CHANNEL
B2B

REGION
US

DECK TYPE
Investor

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 investor 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.

RelayOps Turns Hidden Workflow Friction into an Actionable Operating Advantage

A focused platform, consequential operational problem, and diagnostic-led GTM motion position RelayOps to become the intelligence layer for cross-functional execution.

RelayOps helps mid-market operations leaders see how work actually moves across teams and systems, pinpoint the handoffs creating the greatest risk, and guide measurable improvement.

- Targets operations leaders managing complex workflows across collaboration, project-management, and CRM systems.
- Leads with Connected Workflow Intelligence: a neutral view across systems rather than another source-system dashboard.
- Uses a tailored diagnostic to create an executive-ready entry point for multi-stakeholder evaluation.

Critical Work Breaks Down Between Systems, Teams, and Owners

Operations leaders lack a reliable way to identify which cross-functional workflow failures deserve intervention before they affect capacity, revenue timing, customer experience, or risk.

Source-system reporting shows activity within individual tools, but the costly breakdowns often occur at the handoffs between them.

- Stalled transitions, repeated escalations, rework, and unclear ownership obscure the highest-priority operational problems.
- Teams can default to dashboards, spreadsheets, or periodic workshops that do not reconstruct the full cross-system workflow.
- Leaders need evidence to prioritize a practical intervention and align operations, IT, finance, and functional owners around it.

RelayOps Connects Workflow Signals to Practical, Measurable Intervention

RelayOps reconstructs cross-functional workflows from existing SaaS signals, identifies the highest-risk handoffs, and helps accountable teams improve them.

The platform connects collaboration, project-management, and CRM data to map work across functions, detect stalled transitions and ownership gaps, and surface evidence-backed recommendations.

- Analyze workflows such as the sales-to-implementation handoff from opportunity through onboarding and go-live.
- Alert teams when high-risk work lacks accountable ownership or exceeds an agreed handoff window.
- Recommend targeted rules, escalation thresholds, intake requirements, or automation opportunities, then track interventions and operating outcomes.
- Equip executives with a view of high-risk workflows, accountable owners, actions underway, and trend movement.

RelayOps Workflow Intelligence Platform

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

Product detail	Current source value
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. It analyzes signals from collaboration, project-management, and CRM tools to expose stalled handoffs, recurring bottlenecks, unclear ownership, and process risk, then recommends practical improvements teams can implement and measure.
Category	Operations Intelligence Software
Type	B2B SaaS
Features	Connectors for Slack, Jira, Salesforce, and HubSpot; automated handoff mapping; bottleneck and process-risk alerts; workflow analytics dashboards; AI-generated improvement recommendations; executive reporting
Benefits	Reduce missed handoffs; shorten cycle time; improve cross-functional accountability; reveal operational risk before it affects customers; prioritize the highest-impact process improvements; quantify operational 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

A Neutral Intelligence Layer for the Handoffs That Other Tools Miss

RelayOps combines cross-system workflow reconstruction, prioritized risk detection, explainable recommendations, and intervention tracking for accessible mid-market deployment.

Rather than replace systems of record or add another generic dashboard, RelayOps focuses on revealing where work breaks between the systems teams already use.

- Unlike process mining, it is designed around accessible deployment and actionable cross-functional handoffs.
- Unlike workplace analytics, it centers workflow outcomes rather than employee behavior.
- Unlike work-management and automation tools, it remains neutral across systems and identifies what should change before automating it.
- Unlike BI or internal builds, it provides an opinionated operational data model built to move from signal to intervention.

Marketing Objective

MARKETING 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 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.

Who We're Selling To



**General and Operations Leader for
Scaling Business**

GENERAL AND OPERATIONS MANAGERS

Level: Executive

Department: Operations

Job: General and Operations Managers

Company Type: Any

Role: Decider

Region: US



**IT and Systems Operations
Intelligence Manager**

**COMPUTER AND INFORMATION SYSTEMS
MANAGERS**

Level: Manager Senior Manager

Department: IT

Job: Computer and Information Systems
Managers

Company Type: Any

Role: Influencer

Region: US



**Mid-Market Administrative Operations
Leader**

ADMINISTRATIVE SERVICES MANAGERS

Level: Manager Senior Manager

Department: Administration

Job: Administrative Services Managers

Company Type: Vendor

Role: Buyer

Region: US

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.

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.

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.

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

Milestones

Milestone	Timing	Evidence	Status
Milestone 1			
Milestone 2			
Milestone 3			
Milestone 4			
Milestone 5			

Five-Year Pro Forma

Line item	Year 1	Year 2	Year 3	Year 4	Year 5
Revenue					
Cost of goods sold					
Gross profit					
Sales & marketing	\$750,000				
Product / R&D					
General & administrative					
Operating income / EBITDA					
Ending cash					

Management Team



[Name]
CEO

[Two-sentence bio: current focus, then the experience or results that make this person credible.]



[Name]
CRO

[Two-sentence bio: current focus, then the experience or results that make this person credible.]



[Name]
CMO

[Two-sentence bio: current focus, then the experience or results that make this person credible.]



[Name]
COO

[Two-sentence bio: current focus, then the experience or results that make this person credible.]



[Name]
CTO

[Two-sentence bio: current focus, then the experience or results that make this person credible.]

Advisors



[Name]
GROWTH

[Two-sentence bio: current focus, then the experience or results that make this person credible.]



[Name]
FINANCE

[Two-sentence bio: current focus, then the experience or results that make this person credible.]



[Name]
PARTNERSHIPS

[Two-sentence bio: current focus, then the experience or results that make this person credible.]



[Name]
LEGAL

[Two-sentence bio: current focus, then the experience or results that make this person credible.]



[Name]
OPERATIONS

[Two-sentence bio: current focus, then the experience or results that make this person credible.]

Ask & Use of Funds

Use	Amount / Share	Purpose	Milestone unlocked
Use 1			
Use 2			
Use 3			
Use 4			
Use 5			