B2B Revenue Transformation Roadmap: From Infrastructure to Growth
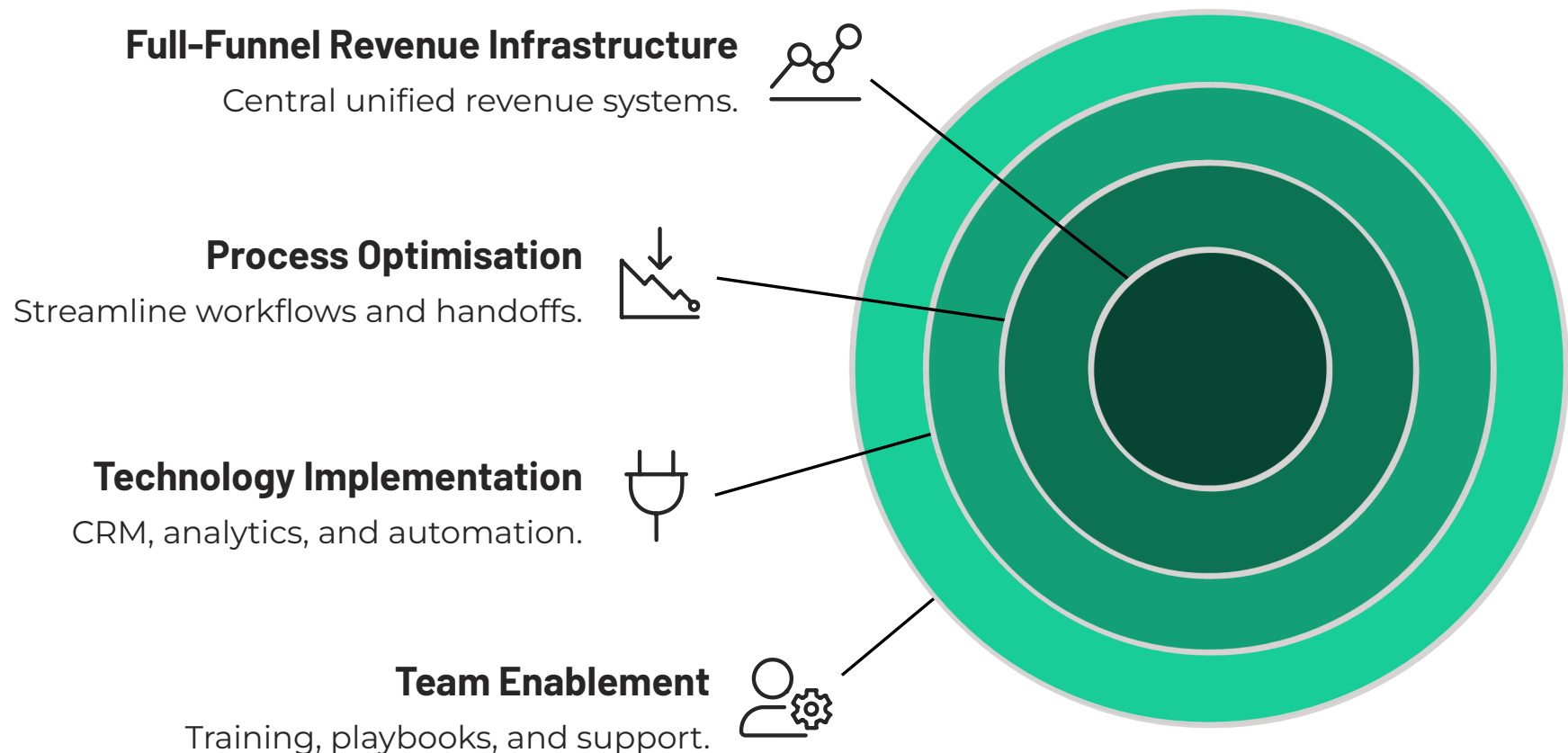
This comprehensive roadmap outlines our boutique RevOps & GTM-build strategy designed specifically for owner-led B2B firms seeking rapid revenue infrastructure implementation.

We deliver a complete solution—process, technology, and people—within 30-60 days, with targeted 12-month outcomes including

- 40 SQLs per quarter
- 15 percentage point lift in proposal-to-win rates
- ARR growth from £0.5M to £1.2M through productised sprints and retainer upsells.

Our RevOps & GTM Transformation Approach

As a boutique RevOps & GTM-build studio, we specialise in rapidly deploying full-funnel revenue infrastructure for owner-led B2B firms who need expertise but don't want the overhead of building an internal team. Our approach is uniquely positioned to deliver significant results within constrained budgets (typically under £100K annual sales-enablement and demand generation spend).

Full-Funnel Revenue Infrastructure
Central unified revenue systems.

Process Optimisation
Streamline workflows and handoffs.

Technology Implementation
CRM, analytics, and automation.

Team Enablement
Training, playbooks, and support.

North Star Metrics (12-Month Horizon)

Our engagements are built around clear, measurable outcomes that directly impact your bottom line:

- **Lead Generation:** Generate 40 SQLs per quarter through optimised multi-channel strategies
- **Conversion Enhancement:** Lift proposal-to-win rate by 15 percentage points through improved sales enablement and proposal automation
- **Cost Efficiency:** Maintain blended Customer Acquisition Cost (CAC) at or below £2,000
- **Revenue Growth:** Scale Annual Recurring Revenue from approximately £0.5M to £1.2M via productised sprints and strategic retainer upsells

Our implementation methodology focuses on rapid deployment (30-60 days) to ensure you see measurable results quickly. This accelerated timeline is made possible through our pre-built frameworks and systems that we customise to your specific business needs, rather than building from scratch each time.

By combining process engineering, technology implementation, and team enablement into a unified approach, we ensure that your revenue operations function as a cohesive system rather than siloed activities. This integrated strategy addresses the common gaps we see in owner-led B2B firms where sales, marketing, and customer success often operate independently, leading to leakage throughout the revenue funnel.

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Competitive Landscape Analysis

Understanding how we compare to other providers in the market is crucial for appreciating our unique approach. We've conducted a thorough analysis of the competitive landscape to highlight key differentiators and advantages of our RevOps solution.

Winning by Design

Core Offer: SaaS sales training & blueprint methodologies

GTM Channels: Podcast, playbooks, YouTube content

Limitation: Advisory only—they provide frameworks but don't build or operate revenue systems

Our Edge: We go beyond methodology to actually implement and operate your revenue infrastructure

RevPartners

Core Offer: HubSpot-focused RevOps agency services

GTM Channels: Marketplace badges, RevOps blog content

Limitation: US-centric operations with limited EU/UK presence

Our Edge: Dedicated local operations for EU/UK markets with contextual understanding

Six & Flow

Core Offer: Combined RevOps and demand generation services

GTM Channels: ABM strategies, creative content marketing

Limitation: Broader scope may dilute RevOps specialisation

Our Edge: Focused RevOps expertise with partnership opportunities for complementary services

Sales Empowerment Group

Core Offer: Outsourced SDR plus RevOps consulting

GTM Channels: Case-study heavy marketing approach

Limitation: Headcount-heavy model requiring significant investment

Our Edge: Lean, asynchronous operating model that scales efficiently with your needs

Our positioning in this competitive landscape leverages several distinct advantages:

1. **Implementation + Strategy:** Unlike purely advisory firms, we both design AND implement your revenue system
2. **EU/UK Focus:** Deep understanding of regional market dynamics that US-centric providers often miss
3. **Technology Agnostic:** While we have expertise across platforms, we're not tied to a single ecosystem
4. **Lean Operating Model:** Efficient delivery without the overhead of large headcount requirements

This analysis highlights why owner-led B2B firms who need rapid results with modest budgets find our approach particularly compelling. We combine the strategic expertise of consultancies with the hands-on implementation capabilities of agencies, all delivered through a lean, efficient operating model.

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Current Funnel & Channel-Mix Audit

Before implementing solutions, we must understand your current revenue operations landscape. Our comprehensive audit reveals critical friction points across your funnel that are limiting growth potential.

Top of Funnel (TOFU)

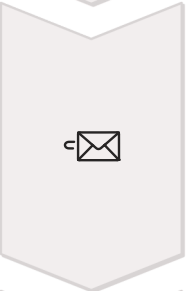**Current Motion:** Single gated PDF; sporadic LinkedIn activity

Primary Friction: Fewer than 5 backlinks resulting in zero SEO visibility; only 1-2 social posts monthly

Inbound Process

Current Motion: Form → manual email → Zoom scheduling

Primary Friction: No automated calendar booking; 24-hour response lag; absence of nurture sequences

Outbound Activity

Current Motion: Ad-hoc founder direct messages

Primary Friction: No ICP list generation engine; no structured outreach cadence

Partner Channel

Current Motion: None established

Primary Friction: Untapped potential with HubSpot/ClickUp System Integrators

Additional Funnel Stages

Product-Led Growth / Sprint Offering

Current Motion: £8K 2-week RevOps Fix (currently hidden)

Primary Friction: No self-checkout option; lack of urgency triggers

This entry-level offering could serve as a powerful lead generator and conversion tool if properly positioned and made accessible through streamlined purchasing options.

Middle/Bottom Funnel

Current Motion: Custom Notion docs & Slides presentations

Primary Friction: Absence of ROI calculator; reliance on manual follow-up processes

The lack of standardised, value-driven proposal materials is creating unnecessary friction in the final stages of your sales process, contributing to lower conversion rates.

This audit reveals significant opportunities for optimisation across every stage of your revenue funnel. The most pressing issues include the manual nature of your lead capture and nurturing processes, inconsistent outbound activities, and underdeveloped proposal mechanisms. These friction points directly impact your ability to efficiently convert prospects into customers and maximise revenue potential.

Growth & Revenue Levers

Based on our comprehensive audit, we've identified six strategic revenue levers that will drive significant growth with varying levels of effort, implementation timeframes, and risk profiles. These initiatives have been carefully selected to address the most critical friction points in your current revenue operations.

Revenue Lever	Expected Impact	Effort Level	Timeline	Risk Level
1. Calendar-First CTA	Increase demos 2-3×	Low	30 days	Low
2. Video Case-Story Engine	+20pp demo→proposal CVR	Low	60 days	Low
3. Product-ised "RevOps Lightning Sprint"	4 new low-friction deals/qtr	Low	30 days	Medium
4. Outbound "Founder SOS" Cadence	20 SQLs/qtr	Medium	60 days	Medium
5. Partner Channel (HubSpot/ClickUp SIs)	30% new ARR	Medium	6-9 months	Medium
6. ROI Proposal Wizard	Close-rate increase to 40%	Medium	90 days	Low

Impact Analysis
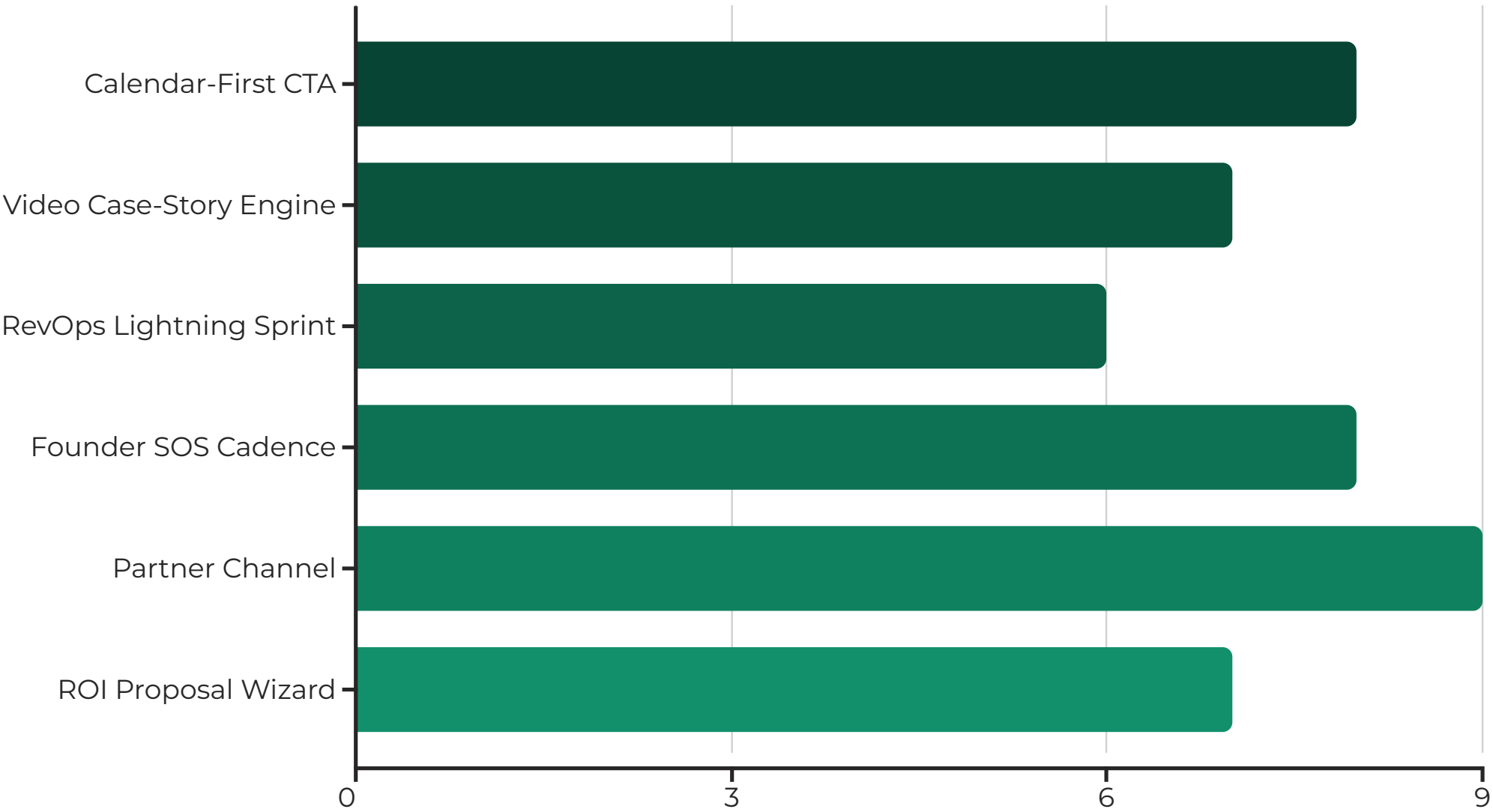
These levers have been strategically selected to create a balanced approach to revenue growth:

- **Quick-win levers** (1-3) can be implemented rapidly with minimal effort, providing immediate momentum
- **Strategic levers** (4-6) require more investment but deliver substantial long-term returns
- The combination addresses the entire funnel from lead generation to closing deals

By prioritising these levers, we ensure we're focusing on the initiatives that will drive the most significant revenue impact while managing implementation complexity and risk. The following sections detail exactly how we'll implement each lever through our proven playbooks and methodologies.

Quick Wins Implementation Playbook (≤90 days)

The following quick-win initiatives can be implemented within 90 days, providing immediate impact on your revenue operations with minimal effort. Each playbook includes detailed step-by-step implementation instructions and target KPIs.

01

Calendar-First CTA Implementation

Steps:

1. Embed ChiliPiper scheduling on website hero section, blog posts, and exit popups
2. Pre-qualify prospects with ARR/pain questions in the booking form
3. Configure automatic routing of £2M+ ARR prospects directly to founder's calendar
4. Implement HubSpot workflow for automated follow-up with no-shows

Target KPI: Site to demo conversion rate ≥3% (currently 1%)

02

Video Case-Story Engine Development

Steps:

1. Record three past-client testimonials using Loom in Q&A interview format
2. Edit footage into one 90-second hero reel plus six 30-second social clips
3. Publish weekly on LinkedIn and integrate into website hero and pricing pages
4. Leverage video clips in retargeting ad campaigns

**Target KPI:** Demo to proposal conversion rate increase of 20 percentage points

03

RevOps Lightning Sprint Productisation

Steps:

1. Implement Stripe checkout with "limited availability" ticker showing only 4 slots monthly
2. Create email campaign targeting lapsed leads with 3-touch outreach via Clay→Lemlist DM
3. Develop post-sprint QBR (Quarterly Business Review) upsell script to convert to retainers

Target KPI: 4 sprint deals per quarter with 50% converting to retainers

Implementation Timeline

| Week 1 | Weeks 2-3 | Weeks 4-6 | Weeks 7-10 | Weeks 11-12 |
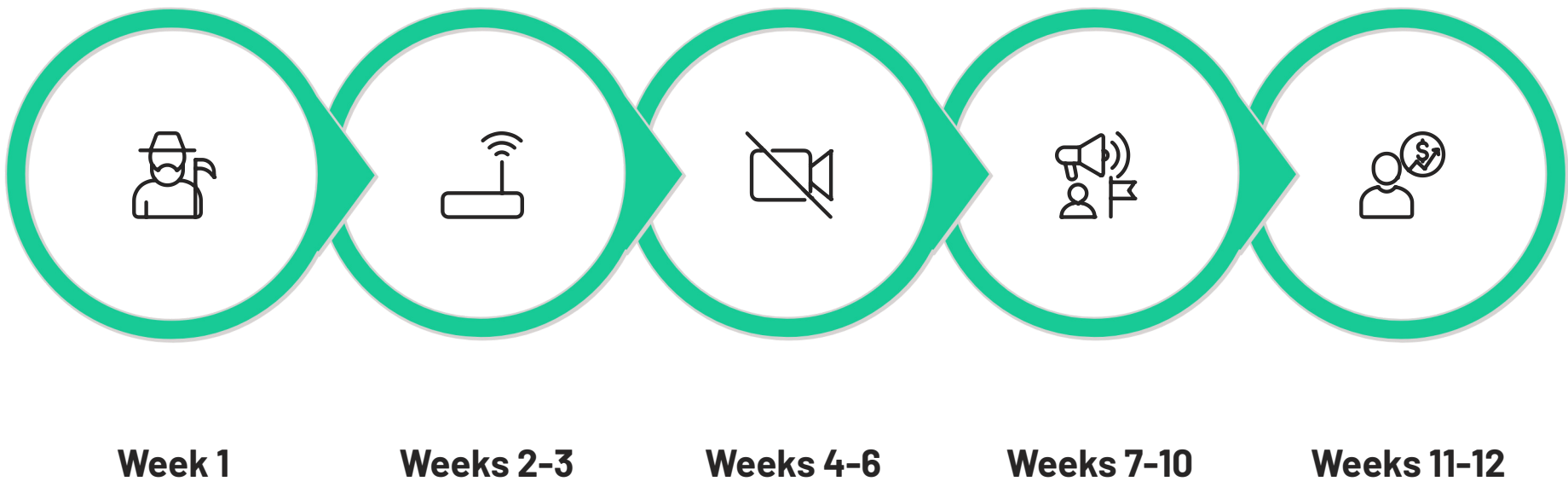
Resource Requirements

These quick-win initiatives require modest investment with significant potential returns:

- **Technology:** ChiliPiper (£3,000/year), Loom/Descript for video editing (£1,000), Clay + Lemlist licenses (£2,000)
- **Time:**
  - Internal: 2-4 hours weekly for coordination and reviews
  - Our team: Implementation and configuration managed as part of engagement
- **Content:** Identification of 3 client success stories and coordination of testimonial recording

These quick-win initiatives provide the foundation for our strategic plays while delivering immediate value. By focusing on these high-impact, low-effort initiatives first, we can build momentum and generate early wins that fuel confidence and investment in longer-term strategies.

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Strategic Plays Implementation Roadmap (6-12 months)

While quick wins provide immediate impact, these strategic initiatives require more investment but deliver substantial long-term revenue growth. Each strategic play includes detailed implementation guidance based on proven methodologies from top-performing CROs.

Outbound "Founder SOS" Cadence

How Top CROs Execute:

- Use Clay to identify founders of companies with £1-10M ARR based on technology adoption and hiring signals
- Implement 5-touch sequence:
  a. Pattern-interrupt Loom video
  b. Value-focused email
  c. Personalised voice note
  d. Case study video clip
  e. Strategic breakup message
- Block dedicated weekly "gold-call" time for high-potential prospects

Success Metric: 20 SQLs per quarter with CAC ≤ £350 per SQL

Partner Channel Development

How Top CROs Execute:

- Map 20 HubSpot/ClickUp System Integrators and structure 20% revenue share + MDF of £1,000 per quarter
- Co-create one video case study per partner to demonstrate joint success
- Implement shared pipeline tracker for visibility and accountability
- Establish quarterly business reviews to assess performance and optimise strategy

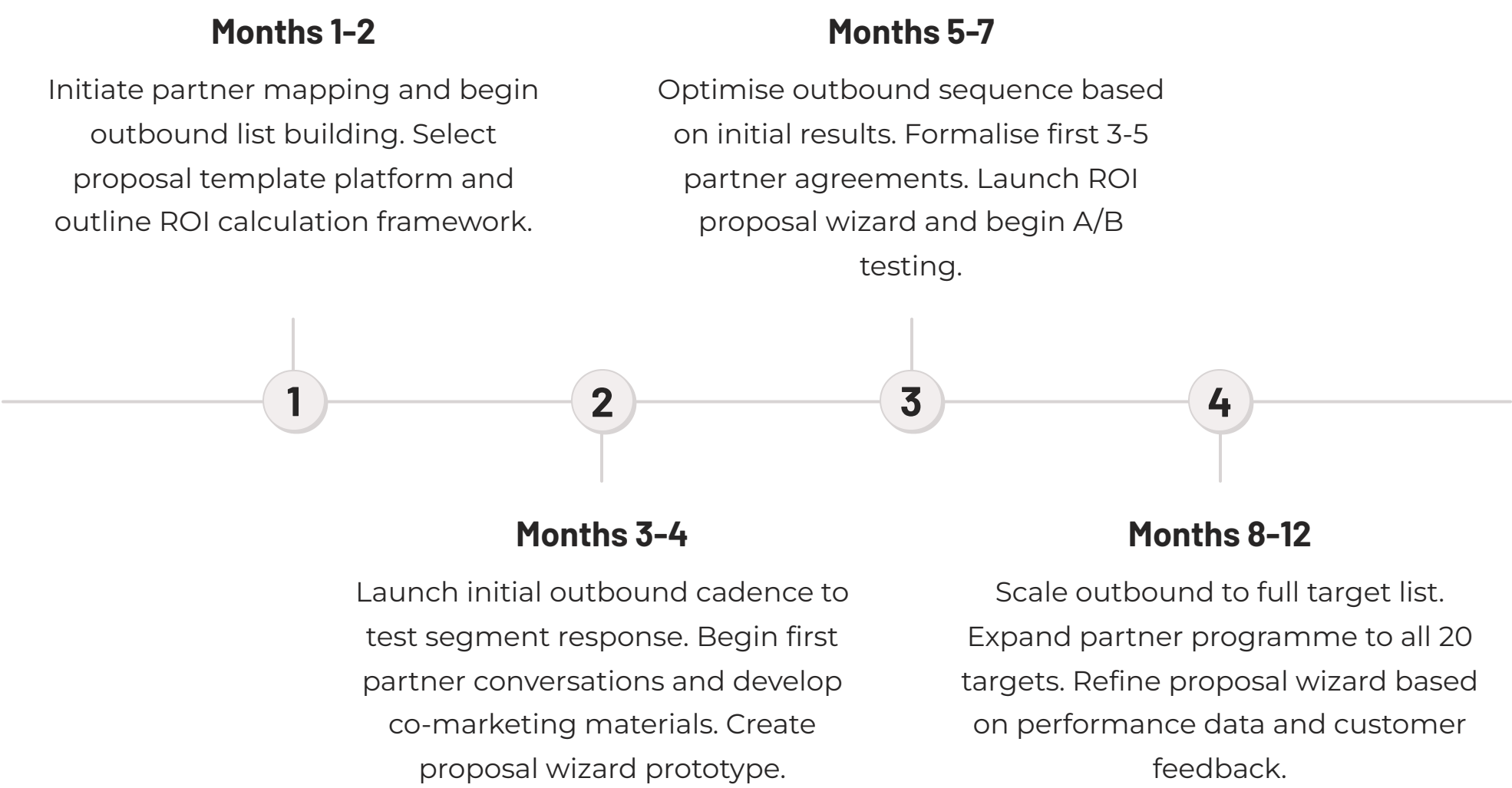**Success Metric:** 30% of new ARR generated through partner channels

ROI Proposal Wizard

How Top CROs Execute:

- Create BetterProposals template that automatically calculates ROI payback period based on deal size and win-rate improvement
- Integrate e-signature capability and Stripe deposit collection
- Conduct A/B testing against legacy proposal documents for 3 months to validate performance improvements
- Refine based on customer feedback and conversion analytics

Success Metric: Win rate increased to 40%, sales cycle reduced by 15%

Implementation Phases

Months 1-2
Initiate partner mapping and begin outbound list building. Select proposal template platform and outline ROI calculation framework.

1

Months 3-4
Launch initial outbound cadence to test segment response. Begin first partner conversations and develop co-marketing materials. Create proposal wizard prototype.

2

Months 5-7
Optimise outbound sequence based on initial results. Formalise first 3-5 partner agreements. Launch ROI proposal wizard and begin A/B testing.

3

Months 8-12
Scale outbound to full target list. Expand partner programme to all 20 targets. Refine proposal wizard based on performance data and customer feedback.

4

These strategic plays require more significant investment of time and resources, but they establish sustainable revenue growth engines that continue to deliver results long-term. By sequencing implementation over 6-12 months, we ensure proper execution while managing resource constraints.

The combination of quick wins (previous section) and these strategic plays creates a comprehensive revenue transformation that addresses all stages of your funnel from lead generation through closing and expansion.

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12-Month Target Metrics & Tracking Framework

Clear metrics provide the foundation for measuring success and guiding optimisation efforts. We've established baseline measurements and ambitious yet achievable goals for each key performance indicator over the next 12 months.

Qualified Pipeline Generation

Baseline: 10 SQLs per quarter

12-Month Goal: 40 SQLs per quarter

Primary Drivers: Calendar-First CTA implementation, Outbound "Founder SOS" Cadence, Partner Channel referrals

Tracking Frequency: Weekly pipeline review with quarterly trend analysis

Proposal-to-Win Conversion Rate

Baseline: 25% conversion

12-Month Goal: 40% conversion

Primary Drivers: Video Case-Story Engine, ROI Proposal Wizard

Tracking Frequency: Monthly conversion analysis with deal-specific review

RevOps Lightning Sprint Volume

Baseline: 0-1 deals per quarter

12-Month Goal: 4 sprint deals per quarter

Primary Drivers: Sprint productisation, limited availability messaging, targeted email campaigns

Tracking Frequency: Weekly sprint slot utilisation tracking

Retainer ARR Growth

Baseline: £0.5M

12-Month Goal: £1.2M

Primary Drivers: Sprint to retainer conversion, Partner Channel development

Tracking Frequency: Monthly recurring revenue tracking with quarterly forecast updates

Blended Customer Acquisition Cost

Baseline: Not currently tracked

12-Month Goal: ≤ £2,000 per deal

Primary Drivers: Content leverage, referral optimisation, efficient outbound targeting

Tracking Frequency: Monthly CAC calculation with quarterly optimisation review

Revenue Growth Projection
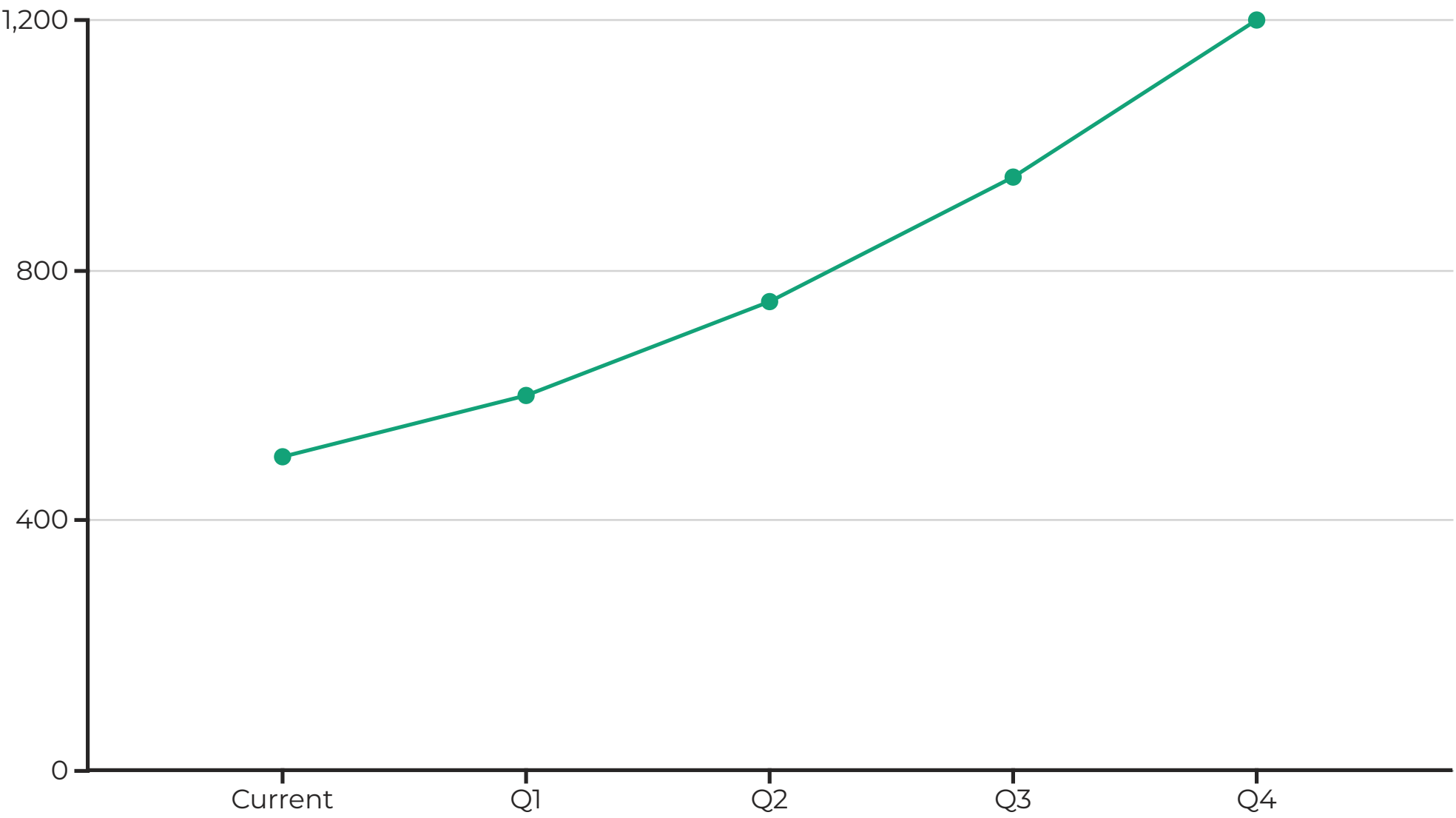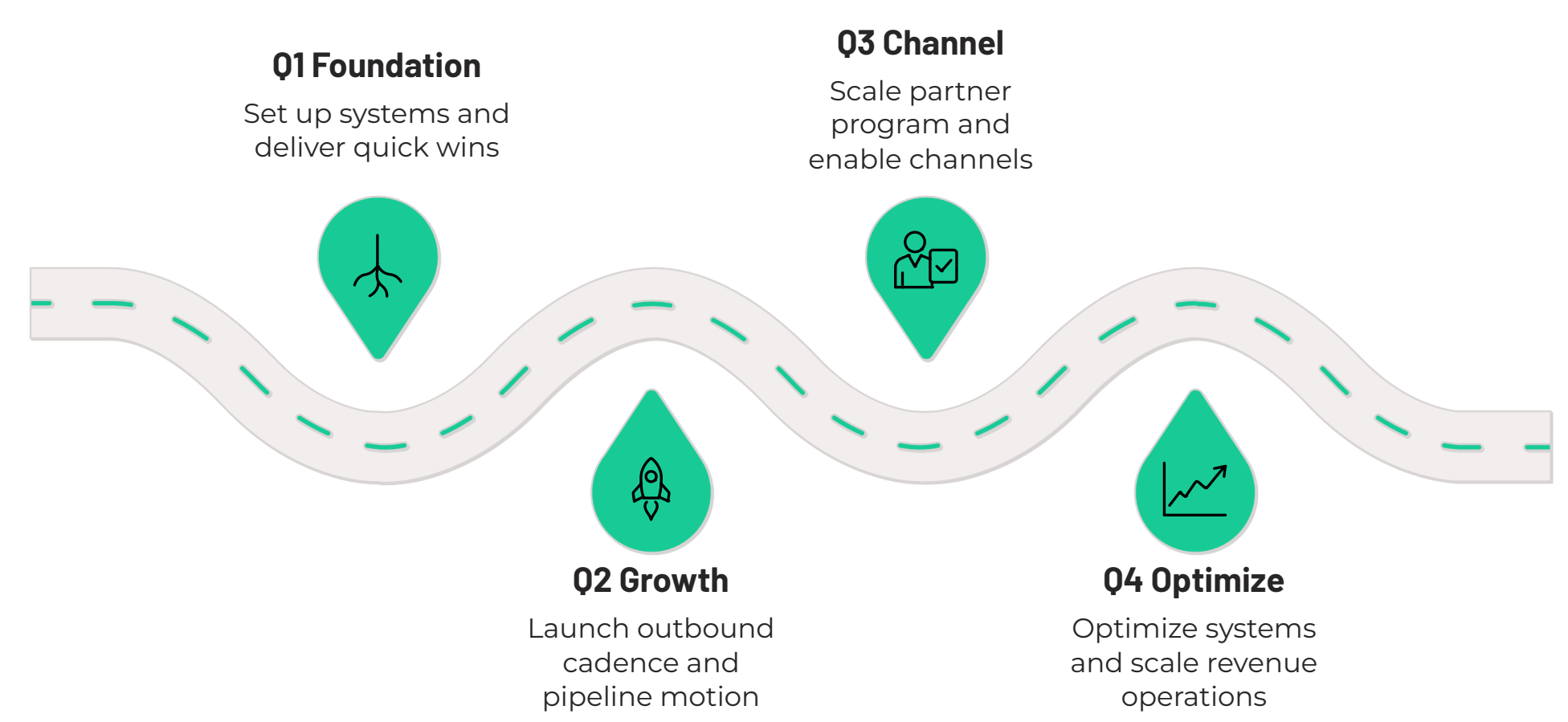

Measurement & Optimisation Framework

Beyond simply tracking metrics, we implement a structured approach to continuous improvement:

1. **Weekly Revenue Operations Reviews:** 30-minute focused sessions examining pipeline movement, conversion rates, and identifying immediate optimisation opportunities
2. **Monthly Growth Lever Assessment:** Deep-dive analysis of each revenue lever's performance against targets with specific adjustment recommendations
3. **Quarterly Strategic Calibration:** Comprehensive review of all metrics with potential strategic shifts based on data-driven insights

This metrics framework provides both accountability and insight. By establishing clear baselines and goals, then implementing a structured measurement process, we create a system that not only tracks progress but drives continuous improvement in your revenue operations.

Implementation Roadmap & Resource Requirements

Successful execution requires a clear roadmap with appropriate resource allocation. This section outlines the phased implementation approach, resource requirements, and key milestones to ensure we deliver on the promised revenue transformation.

Q1 Foundation
Set up systems and deliver quick wins

Q3 Channel
Scale partner program and enable channels

Q2 Growth
Launch outbound cadence and pipeline motion

Q4 Optimize
Optimize systems and scale revenue operations

Resource Requirements

Technology Investments

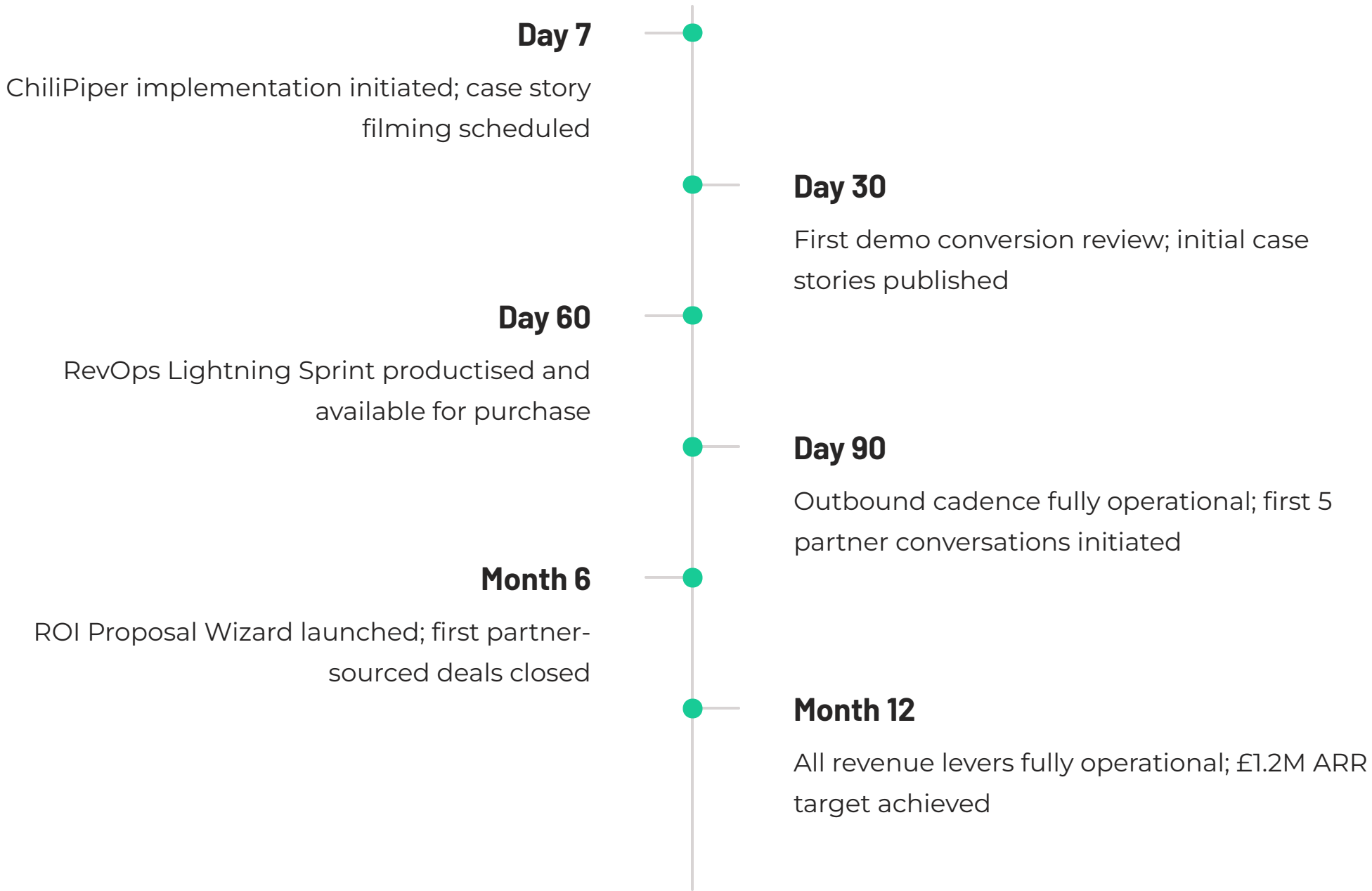| Tool	Purpose	Annual Cost
ChiliPiper	Calendar booking	£3,000
Loom/Descript	Video creation & editing	£1,000
Clay + Lemlist	Outbound prospecting & sequencing	£2,000
BetterProposals	Proposal automation	£1,200
Total Technology		**£7,200**

Time & Personnel Requirements

Internal Resources:

- Executive Sponsor: 2 hours weekly for reviews and approvals
- Subject Matter Experts: 3-4 hours monthly for case study creation
- Sales Team: 1 hour weekly for pipeline reviews and feedback

Our Team's Commitment:

- RevOps Strategist: 10 hours weekly
- Implementation Specialist: 15 hours weekly
- Content Developer: 5 hours weekly

Key Implementation Milestones

Day 7
ChiliPiper implementation initiated; case story filming scheduled

Day 30
First demo conversion review; initial case stories published

Day 60
RevOps Lightning Sprint productised and available for purchase

Day 90
Outbound cadence fully operational; first 5 partner conversations initiated

Month 6
ROI Proposal Wizard launched; first partner-sourced deals closed

Month 12
All revenue levers fully operational; £1.2M ARR target achieved

Risk Management Approach

We've identified potential implementation risks and developed mitigation strategies:

Adoption Resistance
Risk: Internal team members may resist new processes or tools
Mitigation: Phased implementation with clear benefits articulation; targeted training sessions; early wins celebration

Partner Channel Delays
Risk: Partner relationships may take longer than expected to yield results
Mitigation: Over-recruitment of potential partners; front-loaded incentives; parallel focus on direct channels

Resource Constraints
Risk: Internal resources may be pulled to other priorities
Mitigation: Clear executive sponsorship; documented resource commitments; flexible implementation schedule

This implementation roadmap provides a clear path to achieving the revenue transformation outlined in this document. By allocating appropriate resources, tracking key milestones, and proactively managing risks, we ensure successful execution of both quick wins and strategic plays over the 12-month timeframe.

Immediate Next Steps & Getting Started

To maintain momentum and begin realizing revenue gains quickly, we recommend the following immediate actions to initiate the implementation of our revenue transformation roadmap.

Week 1 Action Plan

01

Release Initial Technology Budget

Authorise £6,000 for immediate procurement of essential tools:

- ChiliPiper calendar booking system
- Loom/Descript video editing software
- Clay + Lemlist licenses for outbound prospecting

This initial investment enables the implementation of our highest-impact quick wins.

02

Launch Booking System Overhaul

Begin ChiliPiper implementation within 7 days:

- Configure booking workflows and qualification questions
- Implement routing rules for high-value prospects
- Integrate with existing website and CRM
- Test end-to-end booking experience

This initiative directly addresses the 24-hour lag in your current process.

03

Initiate Case Story Production

Begin filming client success stories:

- Identify 3 highly successful client engagements
- Schedule and conduct video interviews
- Begin editing into hero reel and social clips
- Prepare distribution strategy for completed assets

These authentic customer stories will dramatically improve conversion rates.

30-Day Checkpoint Review

Schedule a comprehensive review 30 days after implementation begins to assess:

Performance Metrics Review

- Website to demo conversion rate trends
- Calendar booking system utilisation
- Response time improvements
- Initial video content engagement metrics
- Pipeline growth indicators

Next Phase Preparation

- Review Sprint productisation progress
- Validate outbound list building approach
- Begin initial partner mapping
- Refine implementation timeline based on initial results
- Adjust resource allocation as needed

Executive Commitment Required

To ensure successful implementation, we need the following commitments from your executive team:

1. **Budget Release:** Authorisation of initial £6,000 technology investment within 3 business days
2. **Resource Allocation:** Designated executive sponsor with 2 hours weekly availability
3. **Client Testimonials:** Introduction to 3 reference clients for case story development
4. **Decision Authority:** Clear approval process for implementation milestones

> **"Revenue transformation isn't just about implementing tools—it's about creating a systematic approach to growth that aligns technology, process, and people toward clear business outcomes."**

By taking these immediate steps, we can begin generating measurable improvements in your revenue operations within the first 30 days, building momentum toward our 12-month targets of 40 SQLs per quarter, 40% proposal-to-win rates, and £1.2M in ARR.

We're prepared to begin implementation immediately upon your approval of this roadmap and the release of initial resources. Our team is committed to your success and excited to partner with you on this revenue transformation journey.