

THE GTM OPS DIAGNOSTIC FRAMEWORK

THE CROs PLAYBOOK FOR DIAGNOSING AND PRIORITIZING GTM OPS FOR THE HIGHEST REVENUE IMPACT

UNION
SQUARE
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[Read the full Framework here](#)

STEP 1. UNDERSTAND THE GTM EFFICIENCY PYRAMID

Each part of our GTM process moves through the same four maturity stages. We visualize this in the GTM Efficiency Pyramid.

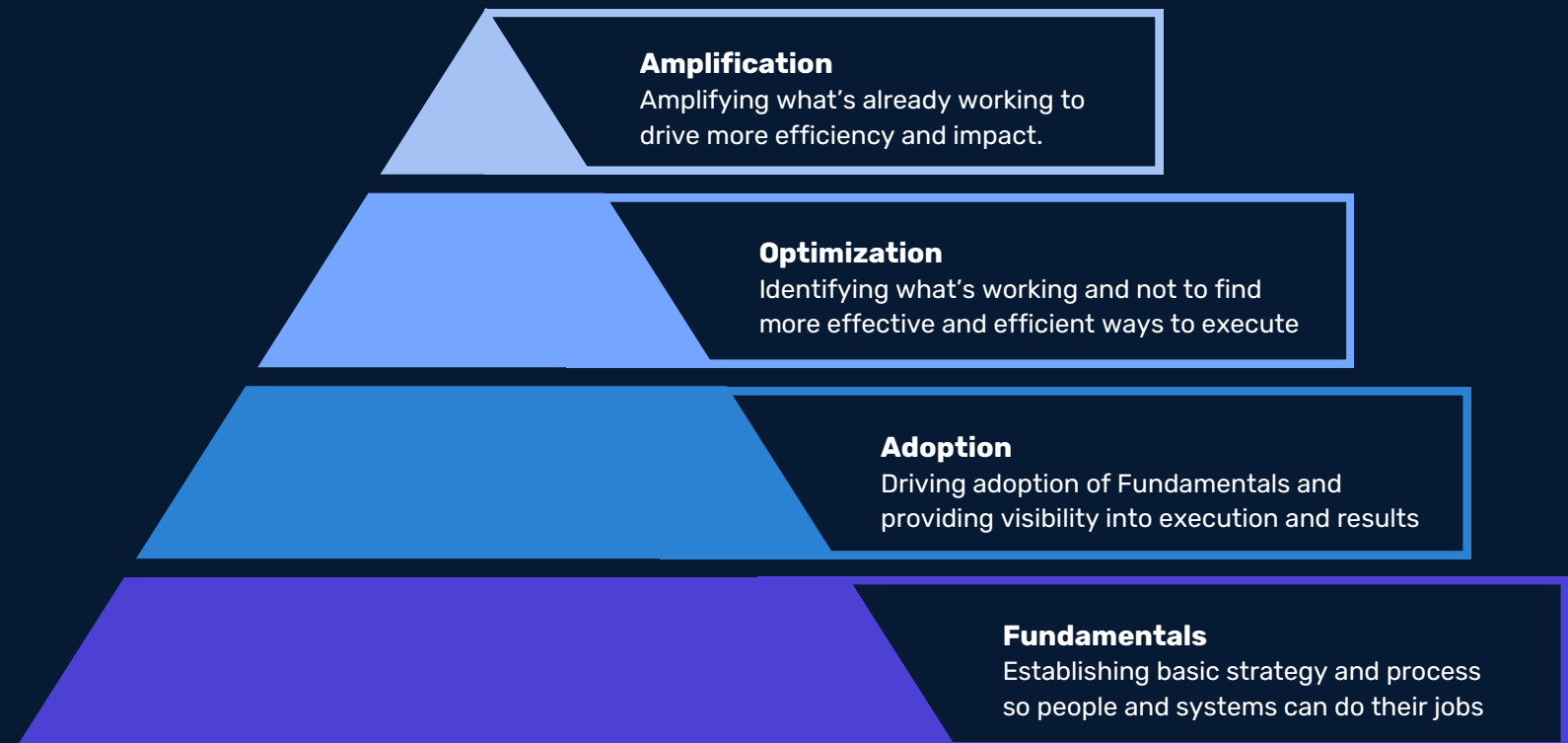
It's important not to skip stages because:

We can't consistently execute on processes that don't exist

We can't optimize what isn't being executed properly

We can't (or shouldn't) amplify what isn't optimized

The GTM Efficiency Pyramid



Fundamentals

- ICP and Buyer Personas are well defined
- The step by step process is defined and documented
- The systems are support execution of the process

Adoption

- We've trained the team
- We have clear reporting and accountability
- Management has a regular review process
- The team is executing the process consistently

Optimization

- GTM Ops and Management regularly analyze GTM data
- GTM Ops uncovers and presents insights on GTM to leadership
- We have a regular meeting to discuss insights and take action

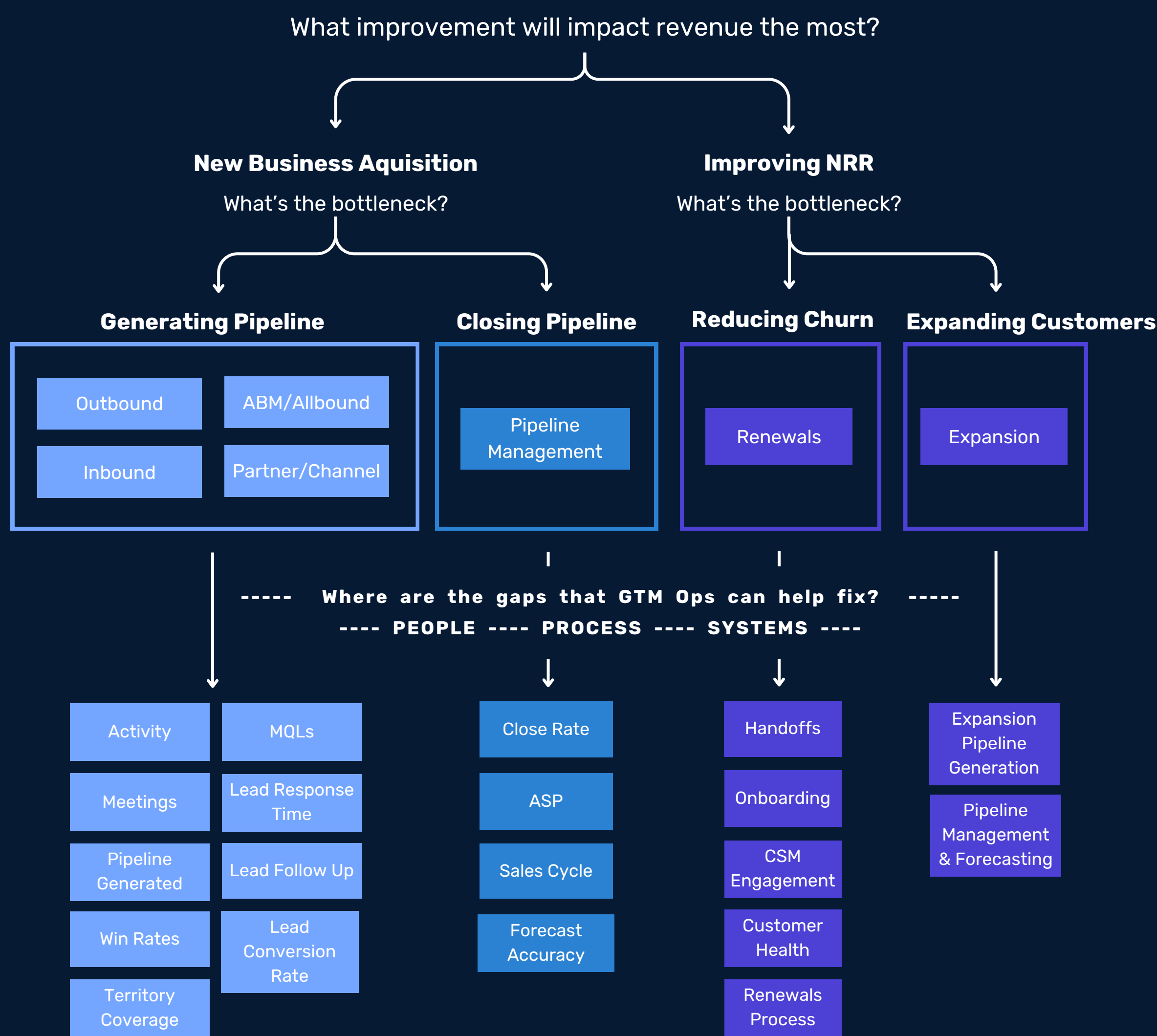
Amplification

- Predictive analytics for forecasting
- AI-powered deal scoring in pipeline
- Automated health scoring for CS teams
- Intent data driving outbound prioritization

STEP 2. IDENTIFY YOUR FOCUS AREA

The GTM Diagnostic we do for our clients is +150 questions. That's way too in depth for the purpose of this exercise. Instead, we want to focus on the biggest constraint or opportunity in GTM that we can work on in the next 90 days or so.

Use the GTM Ops Decision Tree:



STEP 3. ANSWER THE DIAGNOSTIC QUESTIONS

We've simplified this into just 4 questions per area of GTM to make it easier. Each of the 4 questions correspond to the 4 maturity stages.

[Use our customizable worksheet here](#)

Diagnostic Questions with Example Scoring:

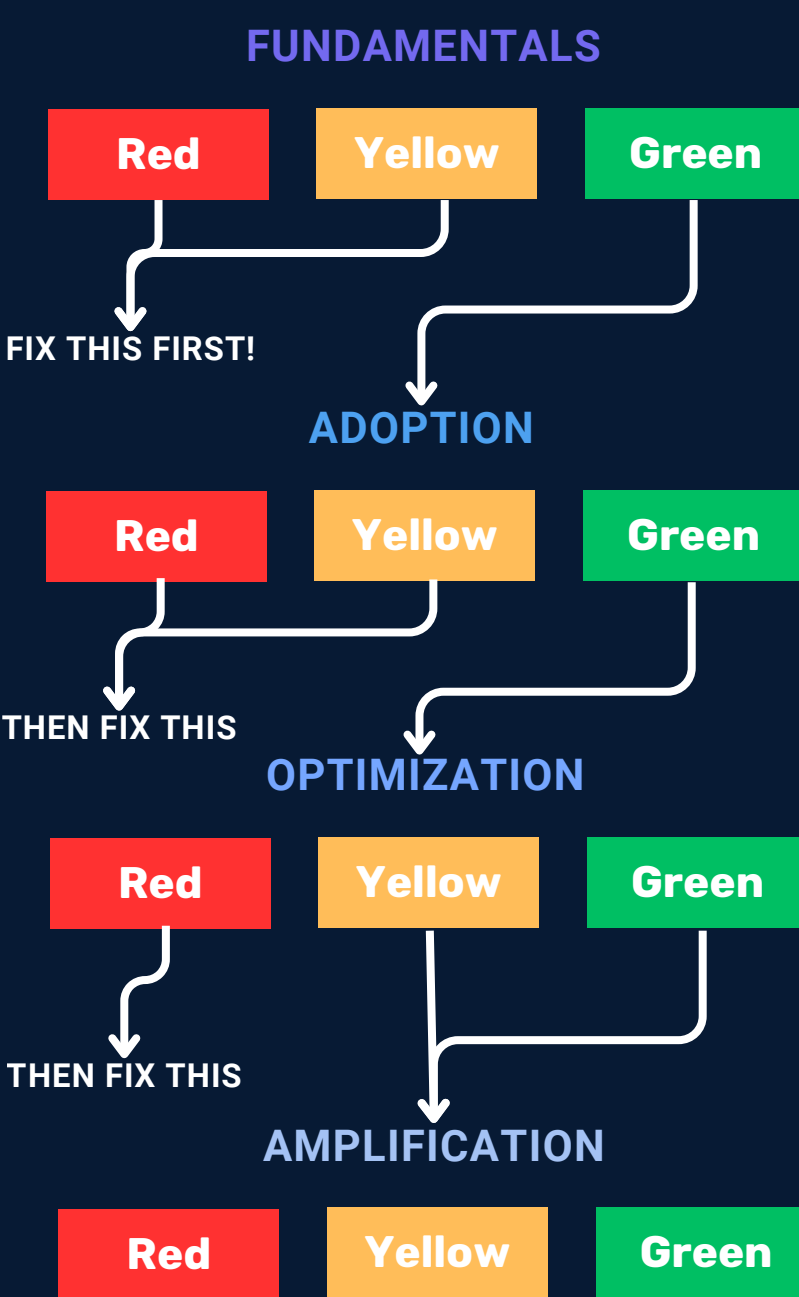
PIPELINE MANAGEMENT			
Fundamentals	1. Do we have a documented sales process with clear qualification criteria, as well as clear stage entry/exit criteria, all implemented in our CRM?	Strong Yes	
Adoption	2. Do our sales managers regularly coach reps on following the sales process and accurately inputting CRM data, resulting in pipeline data that is consistent, accurate, and reliable?	Somewhat	
Optimization	3. Do we analyze pipeline data (by segments) to identify and execute on process gaps, lead quality issues, and resource redistribution opportunities?	Somewhat	
Amplification	4. Are we using automation or AI tools to enhance pipeline visibility, coaching insights, and forecasting?	Strong Yes	
INBOUND			
Fundamentals	1. Do we have a documented lead qualification criteria and routing process implemented in our systems, as well as a defined and documented ICP (that matches with sales and customer success data)?	Strong Yes	
Adoption	2. Do we consistently meet lead-response times and follow-up cadences across all inbound channels, as well as consistent/accurate lead quality tracking data?	Somewhat	
Optimization	3. Do we track conversion from each source all the way to Closed Won/retained/expanded to guide inbound spend, targeting strategy, and refinements to our lead scoring and routing rules?	No	
Amplification	4. Are we using automation or AI to qualify/route leads, accelerate response times, and refine attribution?	Strong Yes	
OUTBOUND			
Fundamentals	1. Do we have defined and documented ICP (that matches with marketing and customer success data) and capacity-based territory assignments for our outbound reps?	Strong Yes	
Adoption	2. Do our reps consistently execute outbound cadences and sales processes with tracked activity and conversion metrics?	No	
Optimization	3. Do we regularly analyze which accounts and personas (by segment) convert and retain best to optimize our targeting and messaging strategies?	No	
Amplification	4. Are we using automation or AI to scale our outbound prospecting efforts?	Somewhat	
ABM/ALLBOUND			
Fundamentals	1. Do we have a defined account scoring model to identify target accounts, a documented process to coordinate inbound and outbound efforts on those accounts, and capacity-based territory plans implemented in our systems?	Somewhat	
Adoption	2. Do our sales and marketing teams consistently execute coordinated account plays with tracked engagement across both inbound and outbound touches, and do we have reporting that ties activity to account-level progression?	Somewhat	
Optimization	3. Do we regularly analyze account engagement data to identify which account segments, plays, and channels drive the best conversion and retention, and use those insights to refine our targeting and scoring models?	No	
Amplification	4. Are we using automation or AI to orchestrate multi-channel account plays, trigger account-based actions based on intent or engagement signals, and optimize account scoring?	No	
PARTNERS/CHANNEL			
Fundamentals	1. Do we have a documented partner recruitment and onboarding process, clearly defined partner tiers or criteria, and a system to track partner-sourced and partner-influenced pipeline?	Strong Yes	
Adoption	2. Do our partner managers consistently execute on the partner engagement process with tracked activities, and do partners have a clear path to register deals and collaborate with our sales team?	Strong Yes	
Optimization	3. Do we regularly analyze partner performance data (by partner, segment, and deal type) to identify top-performing partners, optimize co-selling motions, and refine our partner program?	Strong Yes	
Amplification	4. Are we using automation or AI to scale partner communications, surface co-selling opportunities, and streamline deal registration and attribution?	Somewhat	
RENEWALS			
Fundamentals	1. Do we have a documented process for customer onboarding (including handoff), health monitoring, and renewal management (with defined stages, metrics, and forecasting)?	No	
Adoption	2. Does our CS team consistently execute all process steps with tracked activities, customer health signals, and risk actions?	Somewhat	
Optimization	3. Do we analyze churn patterns, customer health data, and cohort-level retention metrics to identify at-risk segments and improve retention strategies?	No	
Amplification	4. Are we using automated health scoring with risk notifications and AI-driven playbooks to scale CS effectiveness and predict churn before it happens?	No	
EXPANSION			
Fundamentals	1. Do we have a documented expansion process that includes customer journey mapping, capacity and territory planning, account scoring and assignment, a defined account sequencing process, and product and stakeholder whitespace mapping?	Strong Yes	
Adoption	2. Do our expansion reps (or CSMs who own expansion) consistently execute the expansion process with tracked activities, and do we have reporting that shows expansion pipeline by account segment, product, and stage?	Somewhat	
Optimization	3. Do we regularly analyze expansion data to identify which customer segments, products, and engagement patterns drive the best expansion outcomes, and use those insights to refine our targeting and sequencing?	Strong Yes	
Amplification	4. Are we using automation or AI to identify expansion signals, trigger expansion plays based on usage or engagement data, and prioritize accounts with the highest expansion potential?	Strong Yes	

Traffic Light Scoring System:

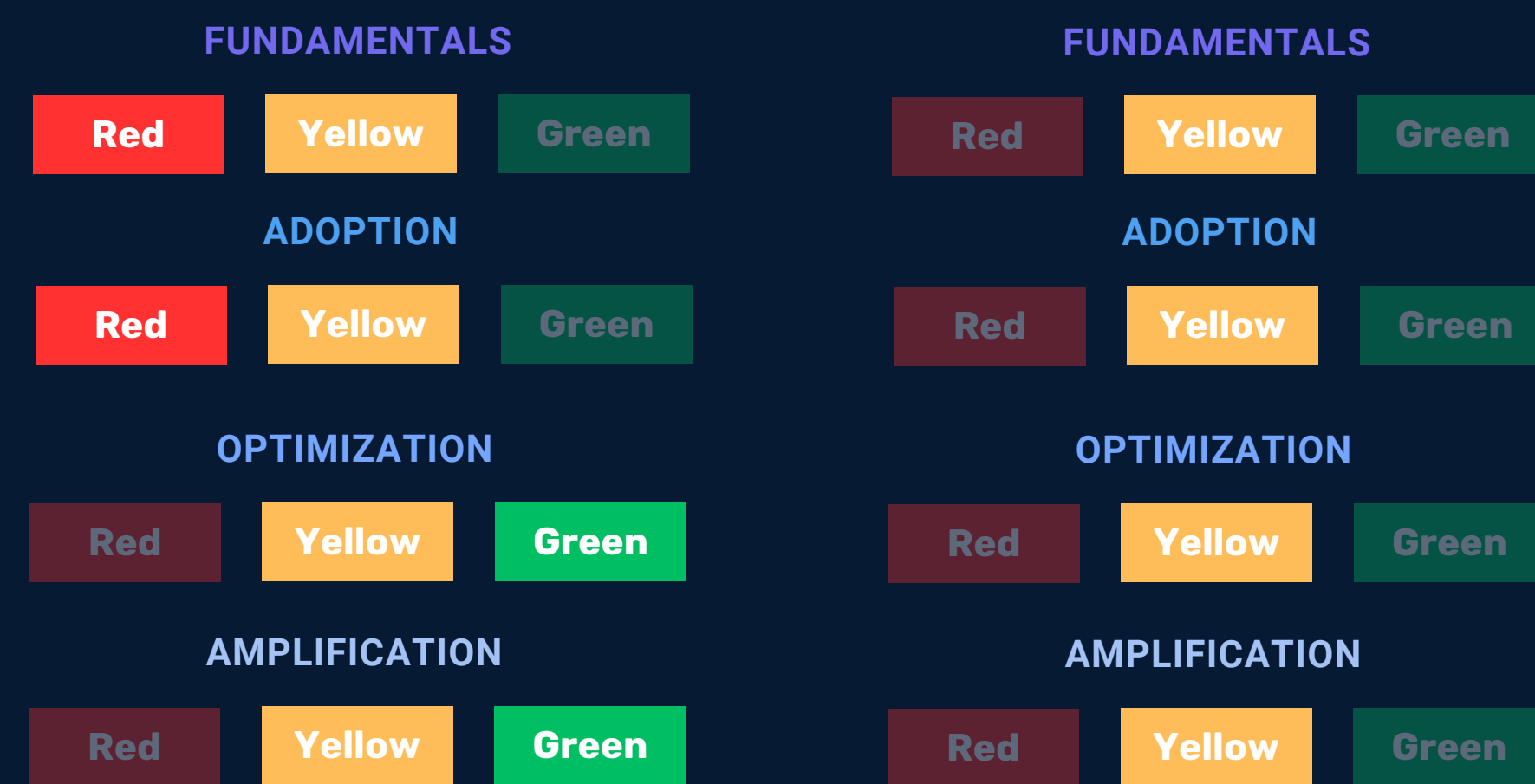
- GREEN: Strong Yes**
We can say yes to every part of the question, with no exceptions.
- YELLOW: Somewhat**
We can only say yes to some parts of the question.
- RED: No**
The most realistic answer to the question would be no.

STEP 5. INTERPRET AND PRIORITIZE

Here's how to interpret your heatmap. Start with the focus area(s) we identified above.



⚠ DANGER ZONES



Optimization or Amplification scoring Yellow or Green while Fundamentals and/or Adoption are Red or Yellow is a hazard for data reliability, scalability, and profitable revenue growth.

If everything is yellow, this usually means nothing has been committed to fixing completely. We're dabbling everywhere but mastering nothing.

STEP 6. BUILD YOUR ROADMAP

To put these insights into action, you'll need a RevOps Roadmap. Explaining the full roadmap-building process is out of scope for this Framework, but luckily we have a whole other Framework on the topic. [Click here to check it out.](#)

Sample Revenue Operations Roadmap			
REVENUE TEAM RESPONSIBILITIES	Key Results	Revenue Operations RESPONSIBILITIES	Owner/Status
1. Generate More Revenue from Marketing	25% Increase in Marketing Qualified Leads (MQLs) by Q3	1. Develop and Implement Marketing Strategy and Plan	Marketing Lead
2. Generate More Revenue from Marketing	25% Increase in Marketing Qualified Leads (MQLs) by Q3	2. Develop and Implement Marketing Strategy and Plan	Marketing Lead
3. Generate More Revenue from Marketing	25% Increase in Marketing Qualified Leads (MQLs) by Q3	3. Develop and Implement Marketing Strategy and Plan	Marketing Lead
4. Generate More Revenue from Marketing	25% Increase in Marketing Qualified Leads (MQLs) by Q3	4. Develop and Implement Marketing Strategy and Plan	Marketing Lead
5. Generate More Revenue from Marketing	25% Increase in Marketing Qualified Leads (MQLs) by Q3	5. Develop and Implement Marketing Strategy and Plan	Marketing Lead
6. Generate More Revenue from Marketing	25% Increase in Marketing Qualified Leads (MQLs) by Q3	6. Develop and Implement Marketing Strategy and Plan	Marketing Lead

STEP 7. INTEGRATING PLANNING AND METRICS

It's extremely important to tie key GTM metrics to the initiatives in the roadmap so that everyone on the team is working towards clearly defined shared goals.

- Tie each initiative to measurable metrics (conversion rates, NRR, CAC Payback, etc.).
- Create a regular cadence to review GTM Metrics and work on improving them.
- Build an Annual GTM Plan using both top-down and bottom-up planning.
- Refresh the roadmap once per quarter based on performance.

STEP 4. PLOT YOUR HEATMAP

This is a simple visual that shows exactly where the weak points are across our GTM Ops. If you're using our worksheet, this will be populated automatically.

	Fundamentals	Adoption	Optimization	Amplification
PIPELINE	Green	Yellow	Yellow	Green
INBOUND	Green	Yellow	Red	Green
OUTBOUND	Green	Red	Red	Yellow
ABM/ALLBOUND	Yellow	Yellow	Red	Red
PARTNERS/CHANNEL	Green	Green	Green	Yellow
RENEWALS	Red	Yellow	Red	Red
EXPANSION	Green	Yellow	Green	Green

Sign up for a free 1-on-1 GTM Efficiency Workshop



Schedule a FREE one-hour session with one of our Senior GTM Strategists to get a real-time assessment of your GTM Engine and receive an actionable roadmap to improve your GTM Efficiency.

*CRO or Equivalent Must Attend

This is not a vetted sales pitch with an AE. You'll get free consulting from one of our most senior people. For this reason, we require the CRO or equivalent to attend the workshop.

[LEARN MORE](#)

Here are a few examples of what we do:

- The GTM Reset That Lifted MQL to Closed Won Conversions From 0.2% to 5% in 3 Months**
This global B2B company was struggling with stale pipeline and unreliable forecasts. In 60 days, we helped them go from 0.2% to 5% lead to closed won conversion and unlock over \$300K in monthly inbound revenue.
[Read the Full Story](#)
- How Solutionreach Unified Sales Execution and Forecasting Through Strategic GTM Design**
When Solutionreach moved into enterprise, their sales process and forecasting lacked the structure to scale. We partnered with their RevOps leader to design a unified GTM strategy, defining stages, segmentation, and dashboards to drive clarity and execution.
[Read the Full Story](#)

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