

# THE GTM OPS DIAGNOSTIC FRAMEWORK

## THE CRO'S PLAYBOOK FOR DIAGNOSING AND PRIORITIZING GTM OPS FOR THE HIGHEST REVENUE IMPACT

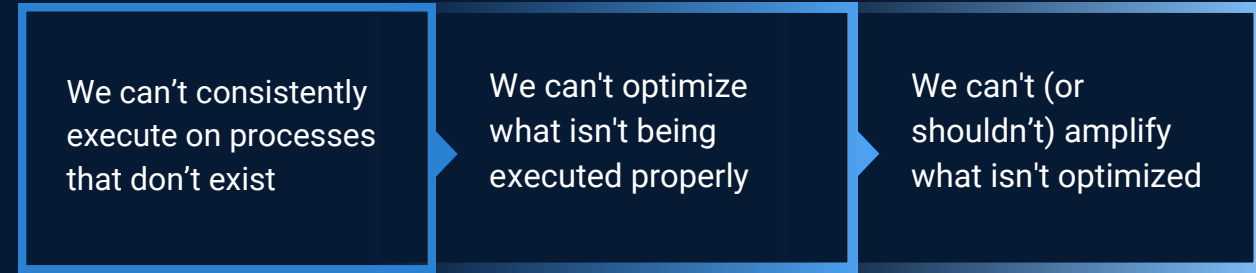
UNION  
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[Read the full Framework here](#)

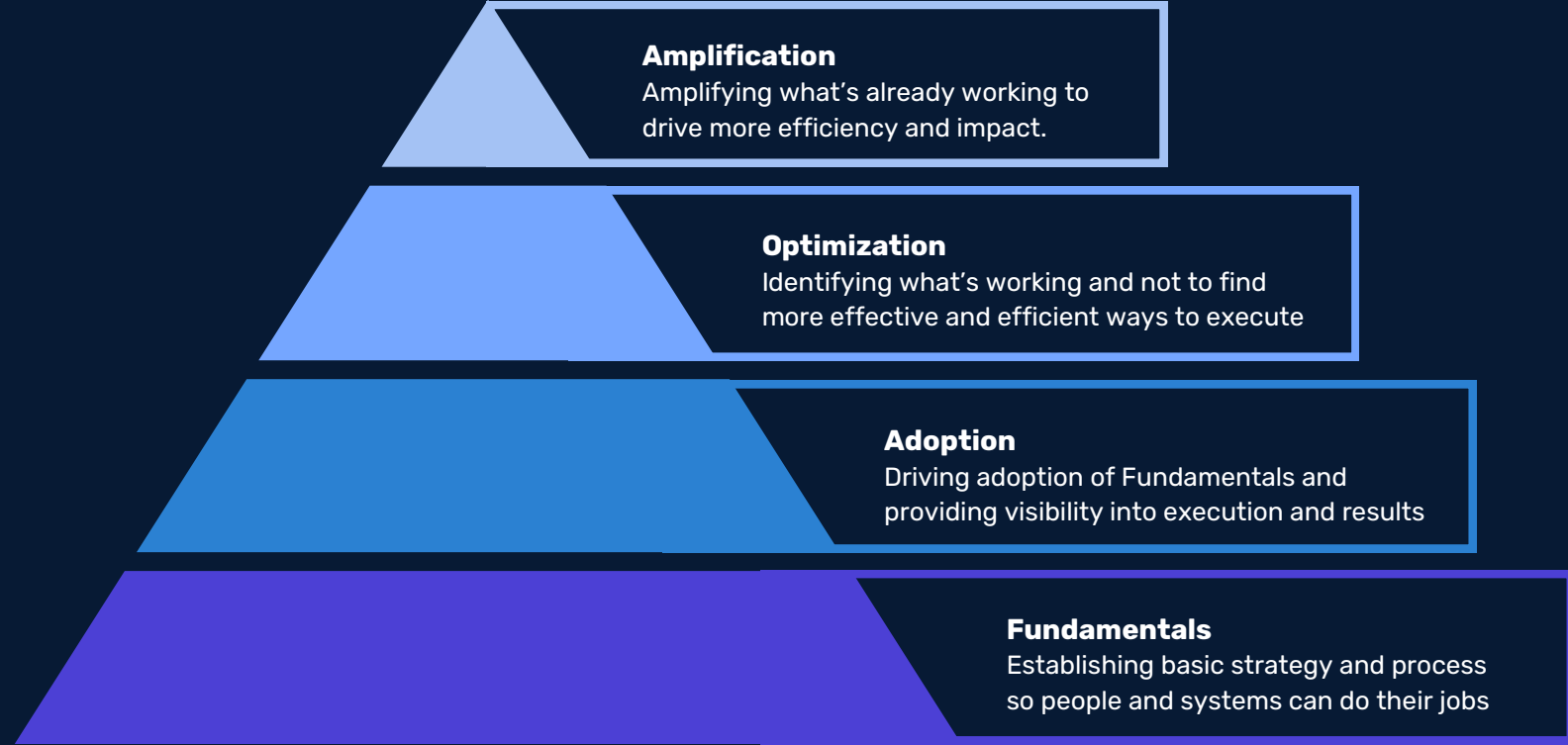
### STEP 1. UNDERSTAND THE GTM EFFICIENCY PYRAMID

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:



#### 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

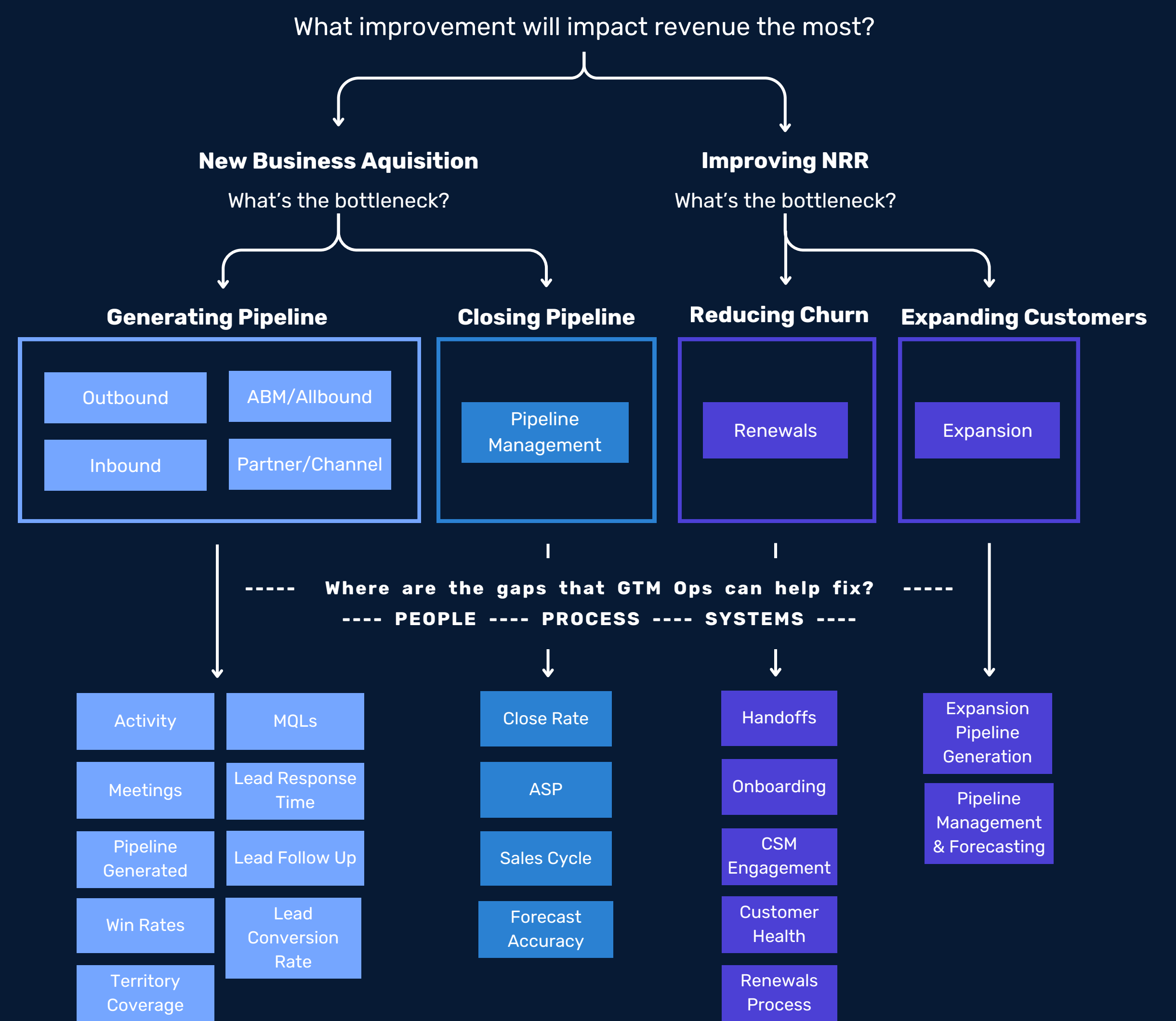
**Amplification**

- 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:

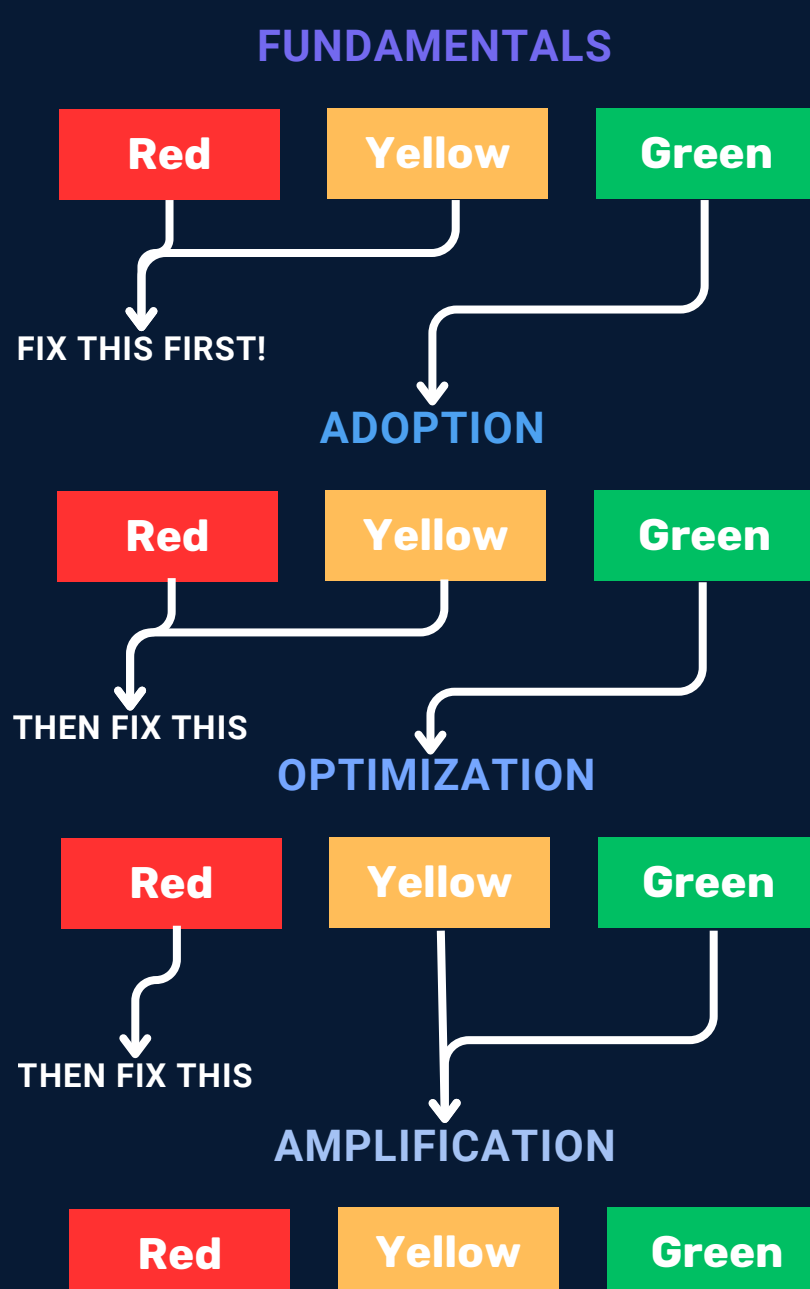
PIPELINE MANAGEMENT	Strong Yes	Somewhat	No
<b>Fundamentals</b> 1. Do we have a documented sales process with clear qualification criteria, as well as clear stage entry/exit criteria, all implemented in our CRM?	Strong Yes	Somewhat	No
<b>Adoption</b> 2. Do our sales managers regularly coach reps on following the sales process and accurately inputting CRM data, resulting in pipeline data that is consistent, accurate, and reliable?	Strong Yes	Somewhat	No
<b>Optimization</b> 3. Do we analyze pipeline data (by segments) to identify and execute on process gaps, lead quality issues, and resource redistribution opportunities?	Strong Yes	Somewhat	No
<b>Amplification</b> 4. Are we using automation or AI tools to enhance pipeline visibility, coaching insights, and forecasting?	Strong Yes	Somewhat	No
INBOUND	Strong Yes	Somewhat	No
<b>Fundamentals</b> 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	Somewhat	No
<b>Adoption</b> 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?	Strong Yes	Somewhat	No
<b>Optimization</b> 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?	Strong Yes	Somewhat	No
<b>Amplification</b> 4. Are we using automation or AI to qualify/route leads, accelerate response times, and refine attribution?	Strong Yes	Somewhat	No
OUTBOUND	Strong Yes	Somewhat	No
<b>Fundamentals</b> 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	Somewhat	No
<b>Adoption</b> 2. Do our reps consistently execute outbound cadences and sales processes with tracked activity and conversion metrics?	Strong Yes	Somewhat	No
<b>Optimization</b> 3. Do we regularly analyze which accounts and personas (by segment) convert and retain best to optimize our targeting and messaging strategies?	Strong Yes	Somewhat	No
<b>Amplification</b> 4. Are we using automation or AI to scale our outbound prospecting efforts?	Strong Yes	Somewhat	No
ABM/ALLBOUND	Strong Yes	Somewhat	No
<b>Fundamentals</b> 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?	Strong Yes	Somewhat	No
<b>Adoption</b> 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?	Strong Yes	Somewhat	No
<b>Optimization</b> 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?	Strong Yes	Somewhat	No
<b>Amplification</b> 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?	Strong Yes	Somewhat	No
PARTNERS/CHANNEL	Strong Yes	Somewhat	No
<b>Fundamentals</b> 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	Somewhat	No
<b>Adoption</b> 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	Somewhat	No
<b>Optimization</b> 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	Somewhat	No
<b>Amplification</b> 4. Are we using automation or AI to scale partner communications, surface co-selling opportunities, and streamline deal registration and attribution?	Strong Yes	Somewhat	No
RENEWALS	Strong Yes	Somewhat	No
<b>Fundamentals</b> 1. Do we have a documented process for customer onboarding (including handoff), health monitoring, and renewal management (with defined stages, metrics, and forecasting)?	Strong Yes	Somewhat	No
<b>Adoption</b> 2. Does our CS team consistently execute all process steps with tracked activities, customer health signals, and risk actions?	Strong Yes	Somewhat	No
<b>Optimization</b> 3. Do we analyze churn patterns, customer health data, and cohort-level retention metrics to identify at-risk segments and improve retention strategies?	Strong Yes	Somewhat	No
<b>Amplification</b> 4. Are we using automated health scoring with risk notifications and AI-driven playbooks to scale CS effectiveness and predict churn before it happens?	Strong Yes	Somewhat	No
EXPANSION	Strong Yes	Somewhat	No
<b>Fundamentals</b> 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	Somewhat	No
<b>Adoption</b> 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?	Strong Yes	Somewhat	No
<b>Optimization</b> 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	Somewhat	No
<b>Amplification</b> 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	Somewhat	No

Traffic Light Scoring System:

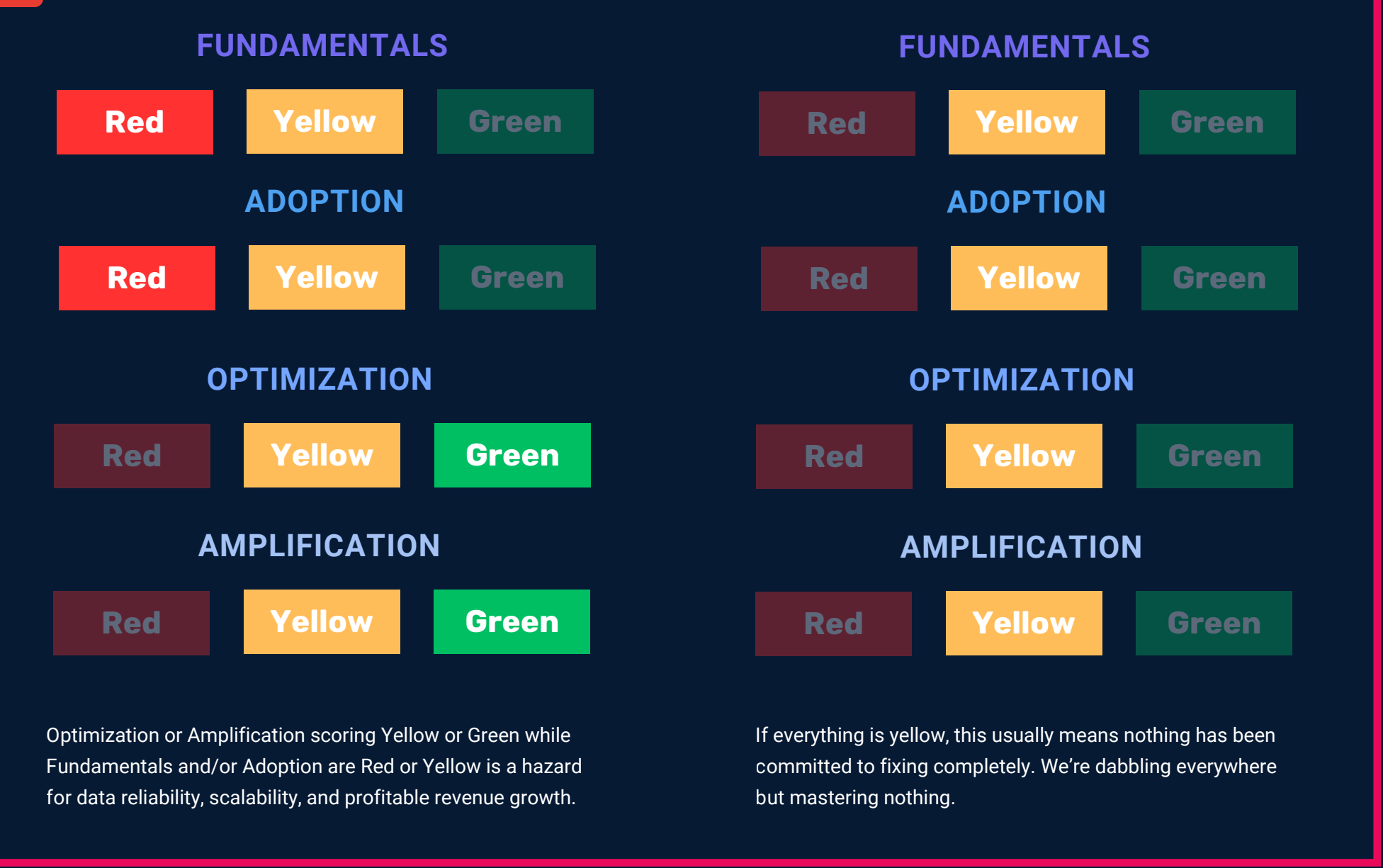


### STEP 5. INTERPRET AND PRIORITIZE

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



#### ⚠️ DANGER ZONES



### 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.

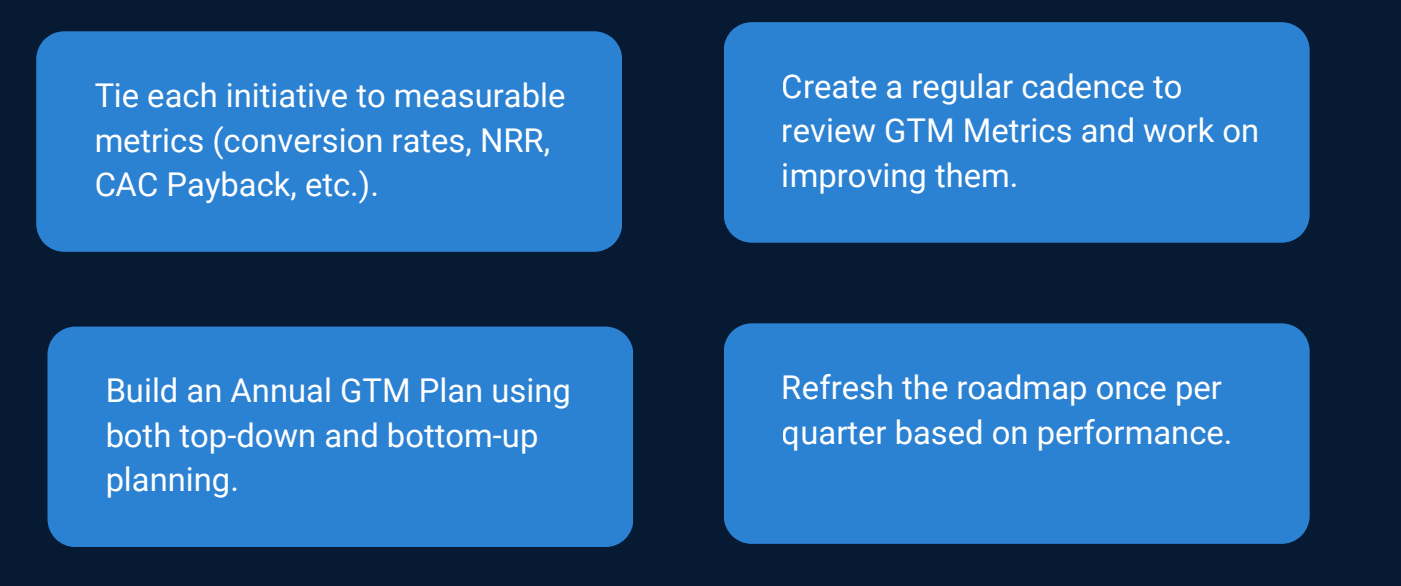
	Fundamentals	Adoption	Optimization	Amplification
PIPELINE	Green	Yellow	Yellow	Green
INBOUND	Green	Yellow	Red	Green
OUTBOUND	Green	Red	Red	Yellow
ABM/ALLBOUND	Yellow	Yellow	Red	Red
PARTNERS/CHANNEL	Green	Green	Green	Yellow
RENEWALS	Red	Yellow	Red	Red
EXPANSION	Green	Yellow	Green	Green

### STEP 6. BUILD YOUR ROADMAP

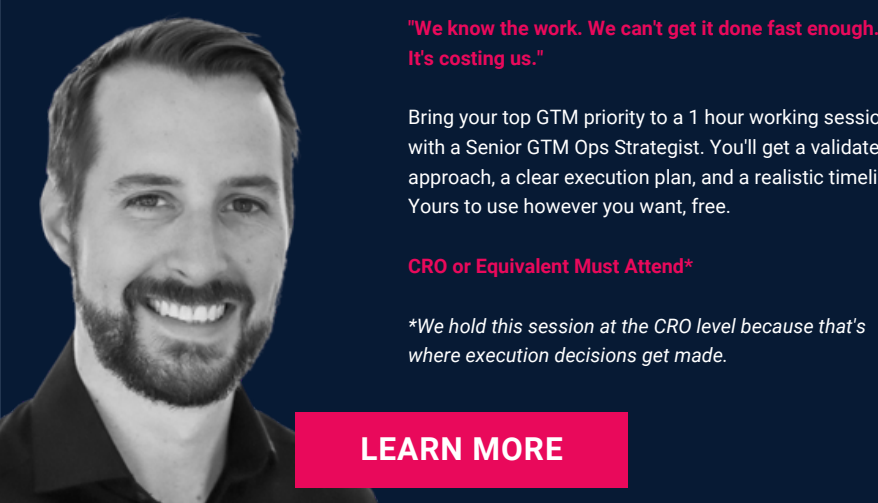
To put these insights into action, you'll need a RevOps Roadmap. Explaining the full roadmap-building process is out of scope for this Framework, but luckily we have a whole other Framework on the topic. [Click here to check it out.](#)

### 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.



### Sign up for a free 1-on-1 GTM Execution 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 get 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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