SAMPLE DELIVERABLE

GO-TO-MARKET PLAN — METHODOLOGY SAMPLE

This is a sanitized template based on real client strategy work, shown here to illustrate how we structure a go-to-market plan from positioning through a first 90-day execution sequence. Company, product, and industry specifics have been replaced with placeholders.

SUBJECT	CATEGORY	PREPARED FOR	DATE
[Client's Platform]	[Client's Vertical]	[Client] Leadership	[Date]

SEC. 01

EXECUTIVE SUMMARY

[Client] builds software for [Client's Vertical]. Its platform, [Client's Platform], was built from the founder's own operating workflow and is now being prepared for external customers. It connects the complete engagement lifecycle:

> **Lead → Client → Job Created → AI Dispatch → Scheduled → Field Execution → Completion Report → Invoice**

The initial market should be owner-led operators in this vertical who currently rely on spreadsheets, text messages, email, shared drives, PDFs, and accounting software rather than a purpose-built system of record.

The recommended posture is a controlled commercial introduction, not a broad public launch: begin with a small number of design partners, then expand into a paid pilot cohort of qualified operators. The first commercial goal is to prove measurable improvement in administrative time per job, billing accuracy and speed, expense recovery, field-team coordination, time from completion to invoice, and reduced owner dependence.

▲ SEC. 02

CORE GTM THESIS

MARKET PROBLEM

Operations in this vertical are frequently managed through fragmented systems never designed around the realities of the work: sourcing, scheduling, documentation, timekeeping, expenses, field notes, completion reporting, invoicing, and accounting reconciliation, all stitched together by hand.

MARKET OPPORTUNITY

The opportunity isn't simply to replace spreadsheets; it's to become the system of record, connecting records usually kept separate: client, job, field personnel, hours, expenses, documentation, invoice, and accounting.

> **Primary commercial hypothesis:** operators in this vertical will pay for a vertically specialized platform when it reduces administrative labor, prevents lost billable revenue, accelerates invoicing, improves documentation, and lets the owner scale without adding equivalent back-office overhead.

▲ SEC. 03

INITIAL MARKET FOCUS

Recommended beachhead: owner-led firms of roughly 5–50 active field personnel, including contractors, with recurring or multi-day engagements. These firms tend to have enough operating complexity to feel real pain, a mix of employee and contractor labor, an owner or ops lead still coordinating details manually, limited internal software capacity, and a strong need to project professionalism to clients.

STAGE	SEGMENT	STRATEGIC RATIONALE
Phase 1	Core vertical operators	Strongest alignment with the primary workflow, documentation, and job-based invoicing this platform is built around.

STAGE	SEGMENT	STRATEGIC RATIONALE
Phase 2	Adjacent specialist operators	Natural adjacency through similar routes, hours, expenses, assignments, and documentation needs.
Phase 3	Related specialist providers	Broader specialist segment with overlapping but not identical operating needs.
Phase 4	General / enterprise operators	Potentially larger, but likely to require different pricing, scheduling, payroll, compliance, and support models.

▲ SEC. 04

IDEAL CUSTOMER PROFILE

BUSINESS CHARACTERISTICS

Privately owned, founder- or operator-led; roughly 5–50 deployable personnel; multiple jobs per month involving hours, travel, expenses, or client deliverables; uses QuickBooks Online or a comparable process; relies on spreadsheets, messages, PDFs, and shared folders; no mature internal operations platform.

OPERATIONAL CHARACTERISTICS

Availability tracked informally; receipts and hours arrive late; briefs are repeatedly rebuilt; completion reports are delayed or inconsistent; invoicing requires manual re-entry; information lives in multiple places; the owner remains the default escalation point.

BUYING TRIGGERS

Lost hours or reimbursable expenses; a recent operational error; growth beyond the owner's personal capacity; adding an operations manager; geographic expansion; more use of contractors; larger or more sophisticated clients; a need for more professional client deliverables.

POOR-FIT DURING PILOT

Solo operators with very low job volume; large enterprise operators needing full workforce management; firms requiring extensive customization before adoption; customers whose compliance requirements exceed current readiness.

▲ SEC. 05

BUYER PERSONAS

PERSONA	ROLE	PRIMARY CONCERNS	MESSAGE
Economic buyer	Owner / CEO	Profitability, growth, reputation, risk, visibility, billing accuracy, reduced owner dependence	Grow the operation without becoming the dispatcher, report writer, receipt chaser, and billing department.
Operational buyer	Ops Director / Field Coordinator	Scheduling, availability, accurate job details, fewer message threads, complete documentation	Coordinate the entire job from one operational record.
Field user	Field Technician / Operator	Simple mobile use, clear details, minimal admin, easy time and receipt submission	Everything needed for the job, without searching through multiple threads.
Financial influencer	Bookkeeper / Finance Manager	Accurate line items, expense categories, invoice speed, accounting compatibility	Move reconciled work into clean billing and accounting records.

PERSONA	ROLE	PRIMARY CONCERNS	MESSAGE
Technical evaluator	Security / IT / Risk Reviewer	Encryption, permissions, logging, data ownership, backups, AI handling, continuity	Demonstrate that sensitive operational data is protected and controllable.

▲ SEC. 06

POSITIONING & MESSAGING

Recommended category: Operations Management Platform for [Client's Vertical].

Sales category shorthand: the job-to-invoice operating system for [Client's Vertical].

> **Positioning statement:** for operators in [Client's Vertical] managing personnel, jobs, hours, expenses, reports, and client billing across disconnected tools, [Client's Platform] provides one operating system that connects the entire engagement lifecycle. Unlike generic project-management or scheduling software, it's built around the documents, decisions, people, and financial workflows this vertical actually uses.

ONE-SENTENCE PITCH

[Client's Platform] takes a job from initial planning through staffing, onboarding, field execution, completion reporting, and invoicing in one connected platform.

RECOMMENDED WEBSITE HEADLINE

The operating system for [Client's Vertical]. Plan the job, deploy the team, capture hours and expenses, produce client-ready documentation, and invoice the work; without rebuilding the operation from texts, spreadsheets, and receipts.

SEC. 07

DIFFERENTIATION

ANGLE 01

BUILT FROM OPERATIONS, NOT ADAPTED TO THEM

The platform was created to run real operations in this vertical, giving the company credible founder-market fit that's difficult for a generic tool to fake.

ANGLE 02

COMPLETE ENGAGEMENT LIFECYCLE

The value is the connection between planning, field execution, documentation, invoicing, and accounting, not any single piece of it.

ANGLE 03

VERTICAL-SPECIFIC DATA MODEL

Jobs, clients, field personnel, credentials, licensing, briefs, operational minimums, completion reports, and entity-based invoicing, modeled the way this vertical actually works.

ANGLE 04

OFFICE-TO-FIELD CONTINUITY

The command view and the field app form one operating loop rather than two systems that have to be manually reconciled.

ANGLE 05

AI AS AN OPERATIONAL LAYER

AI reduces document assembly and repetitive work; the operator retains judgment and approval. AI does the assembly. The operator keeps the call.

▲ SEC. 08

COMPETITIVE ALTERNATIVES

- **Manual operating stack:** spreadsheets, text/chat apps, email, shared drives, PDF templates, paper receipts, calendars, and general accounting software.
- **General business platforms:** CRMs, project-management tools, workflow platforms, general field-service software, and low-code databases.
- **Vertical-adjacent workforce platforms:** scheduling, timekeeping, dispatch, and payroll systems built mainly for a different (usually more generic) type of recurring field work.
- **Internal custom systems:** spreadsheet-database hybrids or proprietary workflows the firm has patched together itself.

> The most important competitor is usually not another software company. It is the customer's current habit, and the perceived safety of staying with familiar tools.

▲ SEC. 09

PRODUCT PACKAGING

Recommended launch package: Founding Operator Program — 90 days.

INCLUDED CAPABILITIES

Command environment and field app; job management and personnel roster; credentials, availability, and scheduling; timekeeping and receipt capture; job briefs and completion-report generation; invoicing and accounting configuration where production-ready; account setup, workflow mapping, admin training, and field onboarding; weekly implementation review and priority feedback channel.

CUSTOMER COMMITMENT

Assign an internal champion; use the product on real jobs; participate in onboarding and weekly reviews; permit usage analysis; measure baseline and post-pilot results; provide a testimonial or case study when successful.

Commercial discipline: every feature is labeled internally and in sales materials as one of — Available now · Available in pilot · In development · Planned · Concept only.

▲ SEC. 10

PRICING STRATEGY

Pricing should initially be treated as an experiment. The platform shouldn't compete as a low-cost utility; its value comes from labor savings, recovered expenses, faster invoicing, stronger documentation, and the ability to grow without adding equivalent administrative headcount.

Option A · No-cost pilot — **$0**

90/180-day pilot; best for testing market appetite — testing range

Option B · Fixed paid pilot — **$X,XXX–$X,XXX**

Best for lowering buyer risk while maximizing learning — for 90 days

Option C · Implementation + subscription

Best once onboarding effort and support requirements are understood

$X,XXX setup

+ $XXX–$X,XXX / mo

During the first ten customers, optimize for learning, usage, retention, referenceability, and proof of value; not maximum initial revenue.

▲ SEC. 11

SALES MOTION

Recommended motion: founder-led, consultative sales.

STAGE	ACTIVITY	EXIT OBJECTIVE
1	Target identification	Find firms that match the ICP.
2	Operational discovery	Map one job from client request to payment before showing the product.
3	Workflow diagnosis	Identify handoffs, re-entry, delays, missing data, owner dependence, and revenue leakage.
4	Tailored demonstration	Demonstrate the buyer's own workflow rather than a generic feature tour.
5	Readiness review	Assess fit, security, users, integration, migration, champion, and live pilot jobs.
6	Paid pilot proposal	Define scope, success measures, responsibilities, data practices, exit conditions.
7	Onboarding	Configure the organization and train office and field users.
8	Weekly adoption review	Review usage, problems, value, and product requests.
9	Business review	Compare end-of-pilot results with baseline.
10	Annual conversion	Convert successful pilots into annual contracts.

▲ SEC. 12

DISCOVERY FRAMEWORK

> **Opening question:** walk me through the last job you completed, from the initial client request until the invoice was paid.

- Where was the job first recorded?
- How did you identify available field personnel?

- How did you confirm credentials and licensing?
- How was the brief created, and where did schedule changes happen?
- How were hours and expenses recorded and submitted?
- Who produced the completion report, and how long after finish was the invoice sent?
- How many times was information re-entered, and what stayed dependent on the owner?
- What errors occurred in the last six months, and what happens if job volume doubles?

The strongest customer realization is that the firm doesn't merely have a software problem. It has a broken chain of custody for operational information.

▲ SEC. 13

ACQUISITION STRATEGY

- **Founder network:** existing operators, partner firms, former colleagues, clients, and referrals.
- **Industry partnerships:** training providers, consultants, insurance brokers, licensing advisers, attorneys, and specialist bookkeepers serving this vertical.
- **Founder-led outbound:** a highly targeted account list with personalized outreach focused on operational burden and billing leakage.
- **Operator-focused content:** practical content on documentation, receipts, licensing, invoicing, scaling contractor networks, and moving beyond spreadsheets.
- **Adjacent ecosystem assets:** use any existing training, community, or service presence as a long-term acquisition advantage, without letting it distract from proving the core platform's commercial case.

▲ SEC. 14

PILOT DESIGN

Recommended cohort: begin with a small number of design partners; expand to a larger paid pilot cohort only after critical usability, reliability, and security issues are resolved.

QUALIFICATION CRITERIA	BASELINE MEASUREMENTS
Real job volume during the pilot; at least one office admin or coordinator; several potential field users; a clear operational problem; leadership participation; willingness to change workflow; reasonable security requirements; credible potential to become a reference customer.	Time to staff a job; admin hours per job; time from completion to report and to invoice; late expenses and missing receipts; invoice corrections; incomplete field notes; number of systems used; owner hours spent coordinating; onboarding time.

Success is defined by adoption, end-to-end job completion, faster billing, more complete expense capture, fewer corrections, reduced owner dependence, and willingness to continue paying.

▲ SEC. 15

CUSTOMER SUCCESS

TIMING	STAGE	OUTCOME
Week 1	Workflow mapping	Document the current operating process and baseline.
Week 2	System configuration	Set entities, users, roles, records, templates, billing rules, and accounting mappings.
Week 3	Administrator training	Train the ops lead on job creation, staffing, documentation, reconciliation, and invoicing.
Week 4	Field deployment	Train field users and run selected live jobs on the platform.

Recommended activation event: first job completed from creation through invoice, fully inside the platform.

SEC. 16

SECURITY AS PART OF THE GTM

Security is not only a product requirement; for this market, it's part of the sale. The platform may hold client information, locations, credentials, photos, schedules, field notes, and financial records.

- Security overview and data-flow diagram
- Hosting architecture and encryption practices
- Authentication and role-based access controls
- Administrator-access policy
- Backup, restore, and business-continuity processes
- Incident-response and vulnerability-management plans
- Logging and audit capabilities
- AI provider, data use, and retention explanation
- Data ownership, export, and deletion processes
- Privacy policy, terms of service, and subprocessor list

> Trust must become a visible product feature; not a footnote.

SEC. 17

PRODUCT ROADMAP PRIORITIZATION

Prioritize roadmap decisions using four questions: does it help win the initial ICP? Does it increase repeated usage? Does it complete the lead-to-invoice workflow? Does it reduce security, reliability, or adoption risk?

PRIORITY	FOCUS	EXAMPLES
1	Reliability and security	Authentication, permissions, backups, logging, isolation, monitoring, recovery, AI safeguards.

PRIORITY	FOCUS	EXAMPLES
2	Core operational workflow	Job creation, staffing, roster, availability, field assignment, hours, receipts, notes, reporting, invoice.
3	Onboarding and administration	Org setup, imports, templates, billing rules, accounting mapping, help content.
4	Expansion features	Advanced analytics, more integrations, client portals, ecosystem integration, marketplace capabilities.

SEC. 18

METRICS DASHBOARD

CATEGORY	CORE MEASURES
Demand	Target accounts, discovery meetings, demo requests, qualified opportunities, pilot proposals, pilot close rate.
Adoption	Organizations activated, admin WAU, field-user WAU, jobs created/completed, end-to-end completion rate.
Value	Time to first completed job, time to report, time to invoice, admin time saved, expenses recovered, owner hours reduced.
Revenue	Pilot revenue, MRR, ACV, pilot-to-paid conversion, renewal, expansion, CAC, gross margin.
Product quality	Critical defects, tickets per customer, failed actions, integration failures, AI correction rate, uptime, incidents.

▲ SEC. 19

PRINCIPAL RISKS & TESTS

RISK	KEY QUESTION	VALIDATION TEST
Market risk	Is the pain strong enough to pay for?	Conduct 20–30 structured customer interviews.
Segment risk	Is this the strongest initial wedge?	Compare urgency and willingness to pay across target segments.
Adoption risk	Will field users consistently use the app?	Measure use on live jobs.
Pricing risk	Will customers support premium vertical pricing?	Present paid pilot options before a free alternative.
Security risk	Can the platform meet sensitive-data expectations?	Complete an independent security review and buyer questionnaire.
Reliability risk	Can it run live jobs without disruption?	Use controlled rollout, monitoring, rollback, and recovery testing.
AI risk	Are generated outputs accurate and trustworthy?	Require human review and track correction rates.
Integration risk	Does the accounting sync work reliably?	Test multiple accounting configurations.
Concentration risk	Is the product too dependent on one builder?	Document architecture, repository access, and handoff procedures.
Scope risk	Are adjacent lines of business stretching focus?	Give the platform a dedicated owner, budget, and quarterly goals.

▲ SEC. 20

FIRST 90 DAYS

DAYS 1–30 · VALIDATE AND SECURE THE FOUNDATION

- Conduct 20 structured interviews and select one initial ICP
- Map the five most common workflows
- Separate live features from roadmap features
- Complete architecture and security reviews
- Define analytics and pilot baselines; create pilot and security materials
- Recruit design partners and test three pricing structures

DAYS 31–60 · RUN CONTROLLED DESIGN-PARTNER DEPLOYMENTS

- Onboard the first two or three firms; import users and records
- Run live jobs and hold weekly workflow reviews
- Track adoption, errors, and AI correction rates
- Improve onboarding and permissions; validate accounting sync
- Capture customer language and produce the first quantified success story

DAYS 61–90 · CONVERT LEARNING INTO A REPEATABLE MOTION

- Expand active design partners and convert qualified users into paid pilots
- Finalize packaging; standardize onboarding; build discovery and demo scripts
- Produce procurement and security materials; publish one case study
- Build a targeted account list; begin founder-led outbound
- Establish weekly GTM reporting

▲ **SEC. 21**

RECOMMENDED IMMEDIATE DECISION

[Client] should position [Client's Platform] as a specialized operations platform for [Client's Vertical]; not a broad management system and not a generic AI operations tool.

> **Launch a paid, high-touch Founding Operator Program** for operators who want to take a job from planning through invoicing in one connected system.

Sell the business outcomes: faster staffing, cleaner execution, complete documentation, recovered expenses, faster invoicing, less administrative drag, reduced owner dependence. The AI should support the story; it should not be the story.

Strategic long-term opportunity: combining software, an operator network, credentials, multi-market coverage, and field-performance records may ultimately create an operating ecosystem for the vertical. The immediate task is narrower: prove that the platform becomes the daily system of record for a small group of serious operators, and that those operators will pay to keep it.

Sources — client's own operating workflow, product documentation, and go-to-market working sessions. Compiled [Date] · Working draft; refine positioning, pricing, and sequencing as pilot data comes in rather than treating this as fixed.

This sample shows our approach to go-to-market planning: a narrow, trust-led entry over a broad launch, pricing treated as an experiment, and every roadmap or acquisition decision tied back to a named commercial hypothesis. **Get in touch** to talk about a plan like this for your team.