## New Desired Outcome: Double new enterprise customers from 40 to 80 by Dec 31, 2025. Increases revenue predictabili How You Will Feel: The Learning We cultivate resilience 12/31/2025 Demonstrate traction for inve and patience We celebrate progress! Empowered, confident, secure. Able to invest in R&D esourcefu mpowere Choice & Sales training: Increase Gifts & enterprise Freedom visibility at Q4 - Bundle & Truths consultative 10 key adoption in4 We know Wise selling We create our finance/ We are We can do 30% of new how to track own traction fintech hard things. trusted accounts and improve Glorious Sales training: by focusing on conferences Referral advisors who KPIs. handling the right partner help CFOs Our systems Q4 - 80 new Impactful Launch objections program scaled aive CFOs customers. shine in front customers We always bundled confidenceto 10+ active of their have Purposeful Consistently We can 'Enterprise partners and that boards. Q4 - Achieve optionsuse CRM daily outmaneuver Intelligence makes us 200 leads/mo bundles. Useful Suite' larger Investment in We are indispensable referrals. cies competitors Sales manager demand-gen Q3 - Bundle conferences. **Passionate** Install leadership with agility. Change is adoption in campaign: scrappy, and demos. quarterly training. our arowth Podcast capable of 15% of new Unstoppable We can design 'win Sponsorship path, not our solving accounts Every small celebrations' Product enterprise a funnel that win builds THE Engaged marketing works. problems. Q3 - 70 new momentum. alignment with Install Investment in customers CFO pain point: weekly sales I don't have demand-gen Fear of The market Regulatory huddles Enterprise CFOs time to campaign: investing in is saturated. Q3 - Achieve Fear of Readiness LinkedIn move too marketing coach the Failure 160 leads/mo Behaviors Train sales slowly-we that won't sales team. Our team Learning to use can't influence SI convert. competitors **Embarrassed** CRM Investment in them. The deals are are too big. Q2 - 60 new Measure and demand-gen Resistance to too complex; Vulnerable customers Measuring track funnel campaign: SEO We don't have changing the nothing will It's the conversion stages enough sales process speed them marketina Unmotivated Q2 - Achieve rates across weekly ō New Dashboard resources to ("this is how team's fault. 130 leads/mo funnel stages SI compete with we've always oughts Disengaged SI Implement bigger players. done it"). ons Product New CRM new CRM Uncertain Q1 - 50 new marketing customers alignment with Excuses & Limiting Disconnected ts CFO pain point: Q1 - Achieve Thoughts & Rational-Fears & Victimhood Board 100 leads/mo **Beliefs** izations Resistance & Blame Compliance Fear 40 new customers in last 12 months | \$200K in marketing spend yielded low ROI. Sales team **Negative Feelings Current Situation** struggling with long decision cycles. Founder is underpaying herself, high stress, tension between Anxious, frustrated, fearful sales and product teams.