

Workshop for *function heads*

6 artifacts under one function — Marketing

CLIENT · UNDER NDA

CMO · B2B SaaS

MARKETING TEAM	14 people
ANNUAL BUDGET	~\$1M / year
MAIN KPI	CAC payback 22 → 11 months over 9 months
FORMAT	2-day workshop · 7 participants · onsite
DELIVERABLES	6 working docs for the function

INSIDE THIS SAMPLER

- / 01 Function Map — 22 opportunities and leaks inside Marketing
- / 02 ICE x KPI prioritization — top-5 · 5 deliberate drops
- / 03 Stress test — ABM through CEO / Head of Sales / Team / Skeptic
- / 04 ABM initiative tree — owner · MVP · budget · Q3 goal
- / 05 90-day plan with week-1 day-by-day breakdown
- / 06 6-month roadmap — CAC payback 22 → 11 months

Function *map* · *Marketing*

DAY 1 · 10:00-12:30 · AI-TOOL "FUNCTION MAP"

22 growth opportunities and revenue leaks inside the Marketing function. Each rated by impact on CAC payback and lead quality. Input for prioritization in Artifact #2.

MQL → SQL conversion

11% vs 25% benchmark · biggest leak

CAC payback

22 months · target 11

14 active channels

No attribution · 9 are noise

ABM

0 target deals last year

Brand awareness in ICP

12% · below ARR-plan benchmark

Content output

-30% organic traffic YoY

Performance duplicates ABM

Same accounts, two budgets

Sales drifts from leads

Reps prospect cold instead

Sponsorships

0 attributable ROI

SEO restart

Proposed · low strategic value

Lifecycle email

No nurture for stalled deals

Win/loss not tracked

No structured intake from Sales

Pricing page conversion

1.4% vs 3% benchmark

Demo show-up rate

61% · 12 wasted SDR hours/wk

Reference program

0 active customer references

Trial-to-paid funnel

Not instrumented end-to-end

Webinar program

Generic topics · no ICP filter

Partner-sourced leads

Untracked · 0 attribution

Sales enablement

No vertical battle cards

Event sponsorships

\$80K/yr spend · no pipeline

Rebrand initiative

Proposed · doesn't move KPI

+3 marketing hires

Q1 plan · weak vs reallocation

22 OPPORTUNITIES & LEAKS · TARGET OVER 9 MO

CAC payback 22 → 11 months

Prioritization *ICE x KPI*

DAY 1 · 14:00-16:00 · COLLABORATIVE WORK

All 22 points are scored on Impact x Confidence x Ease vs the main KPI (CAC payback). Output: top-5 to invest in + 5 deliberate drops.

TOP-5 · WHAT WE INVEST IN

#	INITIATIVE	I	C	E	CAC IMPACT
1	Sunset 9 channels	7	9	9	-24% CAC
2	ABM program	9	7	6	+8 deals Q3
3	Sales handoff fix	8	8	8	-18% leak
4	Content + community	8	6	5	-12% CAC
5	Partner channel	5	7	5	+5% leads

DROPPED · WHAT WE DELIBERATELY DON'T DO

- **Event sponsorships** \$80K spend · 0 attributable pipeline · reroute to ABM.
- **SEO restart** 12-month payoff · doesn't move CAC payback target.
- **Website rebrand** Cosmetic · no link to MQL→SQL conversion.
- **+3 marketing hires** Reallocating the existing team gives the same throughput at lower cost.
- **Generic webinars** Wrong audience · 0 ICP-filtered registrations.

Stress test *ABM program*

DAY 1 · 16:30-18:00 · AI-TOOL "STRESS TEST"

Priority under test: "ABM program". 4 challengers ask one sharp question each. Surface blind spots before the team hits them in month 2.

CEO

How does ABM tie to quarterly revenue targets? If it works, what's the next constraint — Sales capacity or deal size?

HEAD OF SALES

Who actually closes ABM-sourced pipeline? Are reps trained for 4–6 month cycles? Where's the handoff?

TEAM

Do we have ABM skills in-house, or are we learning on production traffic? What gets de-prioritized to free up bandwidth?

SKEPTIC

And if Q1 closes 0 deals? Sunk budget plus missed channel investment. Kill criteria locked at week 12?

RISK MAP · COUNTERMEASURES

- ✓ **Sales handoff not built** → **joint kickoff in week 1**
Marketing + Sales co-own the playbook for the first 8 weeks.
- ✓ **No ABM skills in-house** → **external advisor for 8 weeks**
Pull in a senior ABM operator part-time during setup. Internal owner shadows.
- ✓ **4–6 month cycle is OK** → **metric is stages, not closed-won**
Track stage transitions weekly. Closed-won read only from week 16.
- ✓ **Kill criteria locked at week 12**
If < 3 deals in late-stage by week 12 → sunset, reallocate to next channel.

ABM *initiative tree*

DAY 2 · 10:00-12:30 · PRIORITY #2

Priority #2 broken down into actions, owners, metrics, and deadlines. Owner: CMO. Target: 8 closed-won deals by end of Q3. MVP in 6 weeks. Budget: \$13K.



OWNER	CMO
KEY METRIC	ABM-sourced pipeline · weekly
Q3 TARGET	8 closed-won deals
MVP	6 weeks · account list live + 2 case studies
BUDGET	\$13K
FIRST CHECKPOINT	Week 6 · 4 active conversations

90-day *plan*

DAY 2 · 14:00-16:00 · WEEKS, OWNERS, CHECKPOINTS

WK 1-4

Sunset 9 channels · ICP list · Sales pairing

WK 5-8

ABM v1 launch · 8 case studies · content series

WK 9-12

First ABM deals · optimization · ops rituals

WEEK 1 · BY DAY

- MON List the 9 channels to sunset · brief the Marketing team.
- TUE Sales handoff kickoff · joint playbook v1 with Head of Sales.
- WED Target ICP — 50 named accounts · profile fields locked.
- THU New team KPI model · weekly cadence locked.
- FRI Review · decision on sponsorship reroute · publish to team.

WEEKLY METRICS · WHAT WE TRACK

- MQL → SQL conversion · weekly
- ABM-sourced pipeline · weekly
- CAC by segment · monthly · CAC payback (rolling) · monthly
- Sales handoff acceptance rate · weekly

6-month *roadmap*

DAY 2 · 16:30-17:30 · AI-TOOL "THINKER"

M1-M2 · FOCUS

Sunset 9 channels · ABM kickoff

M3-M4 · LAUNCH

ABM in production · Sales handoff tuned

M5-M6 · SCALE

Partner channel · community v1 · 2nd wave of CAC reduction

TARGETS BY MONTH 9

CAC PAYBACK	22 → 11 months
MQL → SQL	11% → 26%
ACTIVE CHANNELS	14 → 5
ABM CLOSED-WON	0 → 8 deals
BUDGET PRODUCTIVITY	Same spend · 2x pipeline efficiency
BRAND AWARENESS	12% → 22% in ICP

CRITICAL ASSUMPTION

Sales handoff fix lands in weeks 1-4. Slip > 4 weeks = ABM target shifts.

Within 24 hours

a plan for your function

- / 01 A 2-day workshop plan tailored to your needs
- / 02 A list of output artifacts — what your result looks like
- / 03 Recommended format and participants from your side
- / 04 A price range and what determines it

MESSAGE ON TELEGRAM →

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— Svetlana Vagner · AI-Adviser